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ABSTRACT

This report analyzes policy trends in gifted education in New York, New Jersey, and Connecticut from 1984 through 1994. The decrease in state funding of gifted education during this period is investigated, along with the rise of private and university gifted programs. Findings from the analysis indicated that gifted students possess few of the legal rights or privileges of other special populations and thus, gifted education funding continues to be disposable at the state or municipal level. Although the blame for cuts to gifted education has been placed on the "fiscal crisis", both Connecticut and New Jersey implemented their first major cuts to state-level funding against increases in general education expenditures that were six percent above inflation. In each case, these cuts resulted in significantly fewer pupils being served over time. School districts that suffered most from these cuts were lower economic-level districts or those districts more dependent on state support to keep their programs intact. The need for the development of state or federal level policies ensuring rights for gifted students is urged. Attached charts include information on per pupil expenditures to gifted pupils, the number of children identified, and the number of children receiving gifted education services. (Contains 35 references.) (CR)

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1.0 Introduction

The early 1990s saw a rally of battle cries around the apparent "quiet crisis" occurring in gifted education. During this period, the door to the major political issues in the field was opened by Joseph Renzulli and Sally Reis (1991) of The University of Connecticut in a piece entitled "The Reform Movement and the Quiet Crisis in Gifted Education". Upon coining the term "quiet crisis" Renzulli and Reis pointed to the key features of the ongoing reform movement that appeared to be driving the decline of gifted education. They focused in particular on the conflict between what they perceived to be the "noble goals" of the reform movement:

> *Noble Goal #1: To provide the best possible education to our most promising students so that we can reassert America's prominence in the intellectual artistic, and moral leadership of the world.*
>
> *Noble Goal #2: To improve the education of at-risk students [and especially those students in inner city schools and rural poor areas] who, if they don't drop out, often graduate from high school without the ability to read, write, or do basic arithmetic.* [1]

Renzulli and Reis suggested that both theorists and practitioners, in response to these noble goals, began to blindly adopt such "politically correct" trends as full-time heterogeneous "cooperative" grouping as promoted by Robert Slavin of Johns Hopkins University. As a result, programs that promoted any "segregation" of students by intellectual ability became perceived as "elitist". A second result of the conflict between the *noble goals* was referred to by Renzulli and Reis as "The Dumbing Down of the Curriculum."[2] They stated: "By dragging the nation's entire school achievement level down so low that group differences are minimized, it will appear as if at-risk students are closing the gap with their higher scoring peers." They attributed this "cruel trick of the game" to our inability to explain our failures in improving education for at-risk students. Such an approach to achieving "academic equity" is strangely similar to tactics currently being used to promote "financial equity" in states facing legal scrutiny. In New Jersey, for example, expenditures for wealthy districts are "capped" by the state's legislature in order to narrow the margin of inequity between these districts and their poorer counterparts. The findings and proposals presented in Renzulli's article in 1991 sparked

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[1] Renzulli, J.S. , Reis, S. (1991) *The Reform Movement and the Quiet Crisis in Gifted Education.* Gifted Child Quarterly 35 (1) p. 26

[2] Renzulli, J.S. , Reis, S. (1991) p. 30

an ongoing national policy debate regarding the structure and availability of program opportunities for gifted and talented children.

In 1993, the U.S. Department of Education under secretary Riley released *National Excellence: A Case for Developing America's Talent*. In the June 1994 issue of Roeper Review Charles Desmond, vice-chancellor of the University of Massachusetts at Boston, re-titled the department of education report *"A National Tragedy: The Retreat from Excellence in America"*. Desmond focused on the report's findings regarding the status of gifted education, stating "According to data compiled by the US Department of Education's Office of Educational Research and Improvement (OERI), which issued the National Excellence report, America's most talented students are performing so far below their expected potential that the report warns of grave consequences for the nation." [3] Desmond goes on to suggest that the current status of gifted education is a result of the "indifference of the American people to the needs of children with special talents" and that the failure of our best and brightest students has been "buffeted by a failure of our schools to meet, much less, exceed international academic standards."[4]

Others, including Harry Passow and Rose Rudnitski expressed their concern regarding the recommendations of the report. Passow and Rudnitski state: "We believe that what the Department of Education report does is to effectively shift the education of the gifted from separate, isolated programs and provisions to a context of developing every student's potential including those with outstanding talent potential."[5] This ideal is an outgrowth of much of the work of Joseph Renzulli who for many years has promoted "School-wide Enrichment" and more recently "Schools for Talent Development."[6] While Passow and Rudnitski do not criticize this particular ideal as inappropriate, the suggest that the emphasis on "nurturing the talent potential of all students" has provided critics with a basis for eliminating specific provisions for gifted and talented students. John Feldhusen of Purdue University, like Passow expresses his concern that the report does not address the "basic day-by-day curricular and instructional needs of the gifted and talented."[7] Renzulli, as well, has never indicated that nurturing talents on a school-wide basis precludes the need for "differentiated opportunities" or program specialists to coordinate such opportunities.

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[3]Desmond, Charles.(1994) *A National Tragedy: The Retreat from Excellence in America.* Roeper Review. 16 (4) p. 224

[4] Desmond, Charles. (1994)

[5]Passow, H. , Rudnitski, R. (1994) *Transforming Policy to Enhance Educational Services for the Gifted* Roeper Review, June, p.271

[6] Renzulli, J. S. (1994) *Schools for Talent Development: A practical plan for total school improvement.* Mansfield Center. CT , Creative Learning Press

[7]Feldhusen, John.(1994) *A Case for Developing America's Talent: How we went wrong and where we go now.* Roeper Review 16 (4) p. 232

In contrast, Passow and Rudnitski refer to the 1972 *Marland Report* as stimulating growth of programs at the state level by placing emphasis on the gifted and talented as a special population.

> "The report stimulated state and local activities on an unprecedented level with policy formulations that resulted in statutory descriptions or definitions of the gifted; regulations regarding identification of such children; appointment of personnel to state education departments with briefs to initiate, coordinate, and support educational programs and services for the gifted; appropriation of state generated funds for such programs and services; and provisions for both pre- and in-service education of teachers for the gifted." [8]

Among other things, the *Marland Report* provided policy makers with the first federal definition of "Giftedness". Though the separatist nature of the report was later perceived by critics as elitist, the specificity of the *Marland Report* seems to have induced the proliferation of activity on the state and local level that continued through the mid-1980s.

In focusing on the effects of "Reform Movement" on gifted education, Renzulli, Reis and others have squarely placed the blame for the decline of gifted education on political, rather than economic factors. Although more recent articles tend to make frequent reference to the role of the economic recession of the early 1990s (Purcell, 1992, 1993)[9], the evidence for the role of economic factors remains unclear. Among the more logical assertions is that economic constraints may be responsible for increasing the competition for resources among educational programs and agencies. Yet, as evidenced by the aftermath of *National Excellence* it has been the continuing political climate, that has removed the competitive edge that gifted education once had in the late 1970s and early 1980s. These trends are most apparent when performing regional analyses. This is due primarily to the varied impact of the recession across the nation and differing political ideologies. Perhaps hardest hit by both the economic recession and political trends in the field of gifted education has been the Northeastern U.S. , from New England to the Mid-Atlantic states.

1.1 A Regional Perspective: The Northeast

In September of 1991 a Boston Globe front page headline read "Gifted students face test of indifference." The article focused on the relative weakness of gifted

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[8]Passow, H. , Rudnitski, R. (1994) p. 272

[9] Purcell, Jeanne (1993) *The Effects of the Elimination of Gifted and Talented Programs On Participating Students and Their Parents.*

education in the Northeast, pointing out that "Other regions are accelerating investment in programs for the gifted, threatening New England with loss of a longtime economic advantage - its ability to claim a better-educated work force than other areas."[10] Radin pointed out that although "Maine and Connecticut offer stronger support for these programs than other states in the region" they too were suffering from a shaky commitment to their brightest students. Radin stated that "Connecticut, once a national leader with programs for the gifted and talented in 150 of its 169 school districts, has seen 60 percent of its programs cut back or eliminated."[11] An article released in the on-line version of The New Republic in February, 1994, by Gillian Weiss points out that "Over the past six years, New York state's budget for gifted education has stagnated at about $13.4 million out of a budget of approximately $9.1 billion."*

The research of Jeanne Purcell of The University of Connecticut has focused on the decline of programs for the gifted in the state of Connecticut. In a two year study between 1989 and 1991, Purcell surveyed districts throughout the state of Connecticut to assess the status of gifted programs. Purcell noted that " The 1991 results indicate that increasing numbers of Connecticut programs for the gifted are experiencing jeopardy due to the state's continuing fiscal crisis." [12] Purcell's survey of Connecticut school districts, which yielded a 57% response rate (74% among districts with gifted programs) indicated that 61% of Connecticut gifted programs fell into either of three categories: 1) eliminated 2) reduced or 3) threatened. [13] In a subsequent study Purcell pointed to the adverse effects of program elimination on gifted students and their parents. Among other things Purcell noted that "Interviewed parents also reported that the process of program elimination resulted in so much divisiveness that more than half of them had considered alternative avenues for their children's remaining years in school." [14]

Only recently has the perspective of the media in the Northeast begun to change. In the Connecticut Weekly section of the New York Times (June 26, 1994) Susan Pearsall noted that the needs of the "Best Students" were "Regaining Attention." Though the extent to which her assessment is a reality may be questioned, the tone of the article and anticipation that many districts would restore programs in the near future showed promise for gifted education in the Northeast. Pearsall indicated that as many as nine districts in Connecticut were considering bringing back gifted and talented programs for

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[10]Radin, Charles. (1991) *Gifted Students Face Test of Indifference.* Boston Globe, September 30

[11] Radin, Charles. (1991)

* figures confirmed by State of the States Reports on Education of the Gifted. 1987,1994

[12]Purcell, Jeanne. (1992) *Programs for the gifted in a State Without a Mandate: An "Endangered Species?" Roeper Review* 15 (2) 1992 p. 93

[13] Purcell, Jeanne. (1992) p. 93

[14] Purcell, Jeanne. (1993) p. 177

school year 1994-1995. This potential for positive growth was a significant turn-around from 1991, when 18 gifted programs were eliminated in a single year.

1.2 Legal Rights of the Gifted

Few legal attempts have been made in recent years to acquire "free and appropriate" educational programming for gifted students. Most have centered on the definition of "exceptional" as originally expressed in P.L. 94-142 (Education for All Handicapped Children Act, 1975). Because P.L. 94-142 itself does not include the recognition of, or provisions for gifted students, individual case decisions have been made according to state defined student rights. In Pennsylvania (Ellis v. Chester Upland School District, 1994) where state guidelines have been highly specified it has been determined that "Gifted students are exceptional students within meaning of statutes providing for special education and related services to exceptional students. (22 Pa. Code 14.1, 14.25k)."[15] However, in this particular case it was also determined that "exceptional students, including gifted students, do not fall under statutory definition of 'eligible student' for purposes of authorized placement in private schools (22 Pa. Coded 14.43)." and that "To meet statutory requirements, instruction offered to exceptional students need not 'maximize' students ability to benefit from individualized program but rather must provide 'appropriate program' for student. 22 Pa. Code 14.1, 14.25 k."[16]

In Connecticut (Broadley v. Board of Education, Meriden, 1994), however, where state guidelines are somewhat less clear, the state supreme court under Justice Palmer recently held that:

- a gifted child's right to free public education did not include a right to special education
- the legislature's failure to mandate a program of special education did not violate the equal rights or equal protection provisions of the State Constitution.

Although Connecticut has for many years included funding for gifted education within its state program for special education the state supreme court clearly concluded that a "gifted child did not have constitutional right to free public special education under statutes which established program of special education for certain school children" and that "although special education statutes include gifted children among those 'exceptional'

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[15] Ellis v. Chester Upland School District. West's Educational Law Reporter, v. 96 (Mar. '95) p. 617
[16] Ellis v. Chester Upland School District. p. 617

children who do not progress effectively without special education, special education was mandatory only for children with disabilities."[17]

Each of these recent decisions, although varying widely on their perspectives of the needs and the rights of gifted children have serious implications regarding the rights of gifted students in the context of special education where the unquestionable majority of similar appeals have been awarded to the plaintiffs. In addition, although the judicial bodies of each state function with relative freedom from their respective state legislatures, in the absence of clear federal protection for gifted students, their decisions continue to be bound by the relative strength of state policies.

1.3 Research Questions and Possibilities for the Future

Beyond the research of Purcell, and selective presentations of data by the general media, little substantial evidence has been presented to clearly define the economic health of gifted education in the Northeast following the uprising of the turn of the decade. Though comprehensive in her analyses, Purcell's latest report "The Status of Programs for High Ability Students" again presents a snapshot of gifted education in an isolated context. In this study, Purcell (1995) attempts to assess the status of gifted and talented programs in nineteen states from 1991-1992 in relation to both the "economic health" of the states, and their respective state policies regarding gifted education. Economic health, however, was determined only in relation to one year of data (1990) and included three general economic indicators: unemployment rate, per capita income, and state debt per $1,000 personal income. [18] Although the results of this study indicate that state's in poor "economic health" lacking a mandate for gifted education tend to maintain the least comprehensive services for the gifted (according to a 54% overall survey response rate), there is no indication of trends in programming over time, or trends in the economic climate directly or indirectly surrounding gifted education. [19] In addition, by the time of the release of the data (Spring, 1995) many of the economic specifications made by Purcell had shifted dramatically. What continues to be lacking in the current literature is the recognition of the potential effects of change in either political or economic climate on either a *micro* or *macro* level.

If, as Purcell notes, as many as 50% of parents in districts where programs have been eliminated may be considering alternatives for their children in the future, it may be hypothesized that the decline of programs in the public sector may ultimately be related

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[17] Broadley v. Board of Education, Meriden. West's Education Law Reporter, v. 90 (June 16, 1994) p. 265
[18] Purcell, Jeanne,(1995) *Gifted Education at a Crossroads: The Program Status Study.* Gifted Child Quarterly Vol. 39 (2) Spring , p. 58
[19] Purcell, Jeanne (1995) p. 63

to a rise in demand for private supplementary programs, as well as numerous other opportunities. Chapter 4.0 of this report will focus on the economic health of three of the larger private supplementary programs in the Northeast. For those who would argue that the decline of gifted education in the public schools is a victory for egalitarian education, the potential flight of the financially gifted to private sector programs presents even more serious implications regarding the future of socio-economic stratification of the gifted.

Education in general cannot adequately be assessed as either *static* or *isolated*, and gifted education, like any other field in education must be assessed as component of a *dynamic ecological system*. Among the classic errors of recent reports that have viewed gifted education in isolation is Susan Pearsall's (1994) recent claim in the New York Times that the growth in total number of pupils served in Connecticut programs indicated an upturn in the field, when in fact, as a percentage of the state's *average daily attendance*, the decline, had in reality only begun to level off as of 1992-1993. By analyzing the policy period from 1984-1994, in the context of other events and trends, this study will attempt to identify *Pathmarks*[20] as well as *Benchmarks* for determining the economic health of gifted education.

The policy options presented here-in, are not intended to shift the burden entirely back to the public sector or entirely over to the private sector, but to search for opportunities that will allow students to benefit from the best of both worlds. In some cases, integrated models already exist. Dr. Richard Taubald of the Gifted and Talented Youth Programs Center at Montclair State University indicates that increasing numbers of local school districts in Northern New Jersey are contacting the program in order to send their students to the MSU Saturday program and in the case of the Secaucus, NJ schools, bring the MSU program and its professors into the schools. For the past three years, the Johns Hopkins Center for Talented Youth has also made efforts to increase their outreach to the public schools. The educational and economic benefits of such joint ventures will be addressed in Chapter 5.0 of this report.

2.0 A Policy Perspective: Gifted Education in the Public Schools

2.1 Policy Trends in the Northeast: Mandates and Guidelines

In a study presented by Coleman and Gallagher in 1992, approximately 66% of states were reported to have mandated services for gifted and talented students which included state level funding. Fourteen states had no mandates, two states had no mention

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[20] Richards, C. E. & Hughes, J. T. (1995) *The New Ecology of School Management. Theory, Tools and Cases.* Draft Copy,

of the gifted and talented and one had a mandate with no state funding. [21] The report also indicated that one-fifth of the states (17) included services for the gifted under P.L. 94-142 (Education for All Handicapped Students Act). [22] With regard to teacher preparation, The Council of State Directors (1991) report indicated that only five states required teachers to have in service hours in order to work with gifted and talented students. [23] None of the states presented in this study (New York, New Jersey and Connecticut) have comprehensive mandates regarding the education of gifted children.

2.11 Connecticut

Connecticut is among the states that include provisions for gifted children among its guidelines for special education. "Connecticut's *Regulations concerning Children Requiring Special Education* includes as an 'Exceptional Child' one who

> 'has extraordinary learning ability or outstanding talent in the creative arts the development of which requires programs or services beyond the level of those ordinarily provided in the regular school programs but which may be provided through special education as part of the public school program.' [24]

Although the Connecticut State Department of Education mandates that the local school districts provide exceptional children with a full range of special education services, in the case of gifted and talented, many services are optional:

> Each board of education shall be required only to provide identification, referral and evaluation services for gifted and talented children. The provision of all other special education and related services to gifted and talented children shall be at the option of each board of education. [25]

In short, Connecticut's regulations for gifted education ensure that districts will identify, but not serve their gifted populations.

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[21] Passow, H. & Rudnitski (1993) p. x
[22] Passow, H. & Rudnitski (1993) p. xi
[23] Passow, H. & Rudnitski (1993) p. xiv
[24] Passow, H. & Rudnitski (1993) p. xiv
[25] Passow, H. & Rudnitski (1993) p. xiv

2.12 New York

New York state has traditionally provided funding to local school districts for gifted education, and although the state requires that districts identify gifted students there has never been a mandate that districts provide programming for those students. Under section 3602 of the state's Education Law: if a school district does not wish to conduct a program for educating the gifted as prescribed, that district will not receive the formula allotment. [26] The state, however, does provide several recommendations for local districts. According to Passow and Rudnitski (1993) "New York recommends that each district establish a broadly representative committee to write a plan for educating the gifted which, ideally, would include the following sections:"

1. District's philosophy and definition of gifted
2. Program goals and objectives
3. Identification procedures
4. Programming (curriculum and instruction)
5. Program evaluation procedures
6. Teacher selection and education
7. Program management-roles and responsibilities;communication and awareness; budget, facilities and supplies
8. Timeline for activities [27]

Also according to Passow and Rudnitski (1993) New York state's board of regents have historically played an active role in supporting the education of gifted children. "First issued in 1976 and restated since, the New York state Regents' philosophy has been expressed as follows:

> Because these pupils have the ability to make rich contributions to our culture and society, developing their individual abilities and building on their unique strengths becomes a matter of great importance.
>
> As a group, they constitute an unidentified minority that cuts across all economic, social, racial, and cultural segments of society. They can be found at all ages, in all occupations and in both sexes.
>
> Additionally, it is the position of the Regents that the quality of "giftedness" can occur in varied ways, may emerge at different developmental states, and must be assessed by trained staff on a periodic basis, K-12.

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[26] Passow, H. & Rudnitski (1993) p. 7
[27] Passow, H. & Rudnitski (1993) p. 7

Although the state of New York has never mandated either the identification of, or educational programming for gifted children, the department of education has historically shown their support through funding and philosophical guidelines for educational programming.

2.13 New Jersey

Like Connecticut and New York, New Jersey has never taken a decisive step toward mandating special programs for gifted and talented students. The state does, however, require that opportunities be made available to gifted students. New Jersey has, in general, adopted a pro-active approach to the development and dissemination of model programs for the gifted and talented. The dissemination strategy began with the appointment of a state director and four regional coordinators in the late 1970s. Each of these positions were subsequently eliminated in the 1980s. During the middle portion of the policy period to be analyzed (1985-86 to 1989-90) the New Jersey department of education played an active role in monitoring programs for special populations, including programs for the gifted. Integral to the success of New Jersey's dissemination program is the role of program evaluation. The New Jersey Department of Education provides specific guidelines with regard to evaluation of gifted programs. According to Passow and Rudnitski (1993) "New Jersey's state plan recommends that both formative and summative evaluation are needed:

> Formative evaluation should take place during each step in the development of a program, i.e., needs assessment, goal development, identification, curriculum differentiation, planning for facilities and supplies, staff training, evaluation procedures, and scheduling of timelines. Based upon continuing formative evaluation, necessary changes may be made to improve and/or expand the program during the school year.
>
> Summative evaluation should take place after each phase of implementation to insure that the established goals and objectives are being met. An important aspect of the summative evaluation should be assessment of pupil progress. Based upon this evaluation, necessary changes or adaptations to the program may be planned and implemented during the following school year." [28]

Since the 1989-1990 school year, with the discontinuation of program monitoring, evaluation of programs has been placed back in the hands of local districts. Prior to 1992,

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[28] Passow, H. & Rudnitski (1993) p. 59

program evaluation had been a key component of a district's ability to receive competitive grant funding as described in the next section of this report. With the removal of the competitive grants program, although it affected only a few districts, the incentive to conduct thorough program evaluation has effectively been eliminated.

2.2 Models for Funding Gifted Education

As previously stated, Coleman and Gallagher (1992) reported that two-thirds of the states "have some type of mandate regarding attention to gifted students, which is supported to some degree, *with state funding*."[29] The council of state directors (1991) estimated that a total of nearly $395 million of state dollars were allocated to either local education or intermediate agencies for gifted education. [30] Passow and Rudnitski (1993) note that levels of total state funding ranged from $88 million to $100,000 at the time of their study.[31]

Both New York State and Connecticut have provided per pupil allocations to local districts for gifted education for part or all of the policy period 1984 to 1994. During this policy period, New York state allocations for gifted education have ranged from approximately $4 million in 1983-1984 (excluding the 5 largest districts)[32] to $13.3 million (all districts and agencies), and Connecticut expenditures have ranged from $0 (current) to approximately $9 million (1990). Although New Jersey has not provided per pupil allocations, for several years, competitive grants were available for the development and dissemination of model programs. New Jersey's total spending on gifted education has ranged from $0 (current) to $200,000 at its peak in the mid 1980s.

2.21 Connecticut

Prior to school-year 1989-1990, both handicapped and gifted and talented expenditures were reimbursed on a 30% to 70% sliding scale based on town wealth. For school year 1989-1990 the range for reimbursement was expanded to 25% to 70%. In 1990-1991 and 1991-1992 grants for handicapped were reduced to a 10% to 70% scale and grants for gifted and talented to a 5% to 35% scale. Finally in 1992-1993 the scale for handicapped students was reduced to a 0% to 70% scale (with a 2% floor) and funding for gifted and talented was eliminated. [33] Reimbursements to local districts were paid in

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[29] Passow, H. & Rudnitski (1993) p. xiv
[30] Passow, H. & Rudnitski (1993) p. xiv
[31] Passow, H. & Rudnitski (1993) p. xiv
[32] Curley, John (1991) *Financing Programs for Education of the Gifted in New York State*. Journal of Education Finance. 16 (Winter)
[33] Mahoney, Brian. (1995) CT Department of Education. Bureau of Grants Services. Personal Communication

the year subsequent to the expenditures. The removal of funds from the 1992-1993 budget had severe implications for districts who had received funding in the previous years and had spent substantial funds in school year 1991-1992 expecting reimbursement in school year 1992-1993.

Connecticut's current ECS (Education Cost Sharing) formula still does contain some incentive, however minimal, for districts to maintain gifted and talented programs. Within the formula, local districts are required to meet minimum levels of spending (MER: Minimum Expenditure Requirement). Previously, reimbursable expenditures were not allowable as MER expenditures. With reimbursement no-longer a factor, local dollars spent on gifted and talented education may be counted toward the district's MER. [34]

2.22 New York

In New York State, both per pupil allocations and special legislative grants exist for local districts offering programs for gifted and talented pupils. In 1980-81 the state began distributing funds at a per pupil level of $8 for diagnostic testing and screening of pupils in all school districts. Since 1981-1982 funds for education of the gifted and talented have been allocated to local districts by a categorical aid formula. [35] Initial Flat Grant funding was set at $40 in 1981-1982. Subsequent increases brought the funding level to $192 by 1987-1988 and finally $196 by 1988-1989 where it has remained since. Funds are distributed on a flat grant basis according to the following formula:

Flat Grant Level X .03 X Average Daily Attendance

Special legislative grants are allocated to local districts in New York for a variety of educational projects including those related to gifted education. Legislative grants are paid by reimbursement to local districts upon approval of project expenditures. [36] Between 1988 and 1994, funds for gifted education related grants decreased from $2.8 million to $545,000. [37]

2.23 New Jersey

The history of funding for gifted education in New Jersey is somewhat different than that of either of the other two states. New Jersey first allocated funds for gifted

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[34]Mahoney, Brian (1995)
[35]Curley, John. (1991) 332-347
[36]Curley, John (1991)
[37]Brown, Delbert (1995) New York Department of Education. *Personal Communication*

education in 1976. $100,000 was allocated to appoint a state director (Ted Gourley) and four regional coordinators. The role of the director and regional coordinators was to design and implement model activities for gifted children in districts throughout the state. Among the early products of the state supported team was the Olympics of the Mind (now Cognetics). The philosophy underlying the New Jersey model was, and has continued to be based on development and dissemination of model programs. In 1980-1981 additional funds were provided to begin a competitive grant program. Through this program, local districts were allocated funds in order to develop model programs. Districts applied for funding on an annual basis according to the following guidelines:

> "Local district proposals must include a rationale for the proposed program, a statement to support its effectiveness, a work plan, and a statement to support its portability or replicability."[38]

Although the state eliminated the regional coordinator positions in 1982-1983, the state continued to allocate competitive grants totaling approximately $200,000 until school year 1986-1987 when the amount was decreased to $150,000. Funding was subsequently removed for the competitive grants program in 1992. Currently, activities and programs for gifted and talented students are overseen by the state's Education Information Resource Centers. [39]

2.3 Beyond the Framework of this Study

This particular study focuses its attention on the economic health of gifted education as seen in "typical" public schools with heterogeneous populations and school-year gifted programs. Emphasis is placed on programs that are specifically identified as meeting the needs of gifted and talented students. Upon closer look, one will find many other opportunities available to gifted public school students throughout the selected states. The New York metropolitan area in particular, provides many examples. Within New York city itself are several magnet and alternative schools, to which students may apply to attend. Among these are, The Bronx High School of Science and Stuyvesant High School. In addition Brooklyn's district 18 provides an extensive gifted and talented program and is identified as a district of choice which students from throughout the city may attend.* New York State's board of Regents also mandates that local districts must provide vertical acceleration in the following manner:

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[38] Passow, H. & Rudnitski (1993) p. 59

[39] Gourley, T. & Dorhout (1995) A. *Personal Communication* May, 1995

* transportation is not provided for out of district pupils

> ...eighth grade students who have demonstrated readiness "shall have the opportunity to take high school courses in Regents mathematics and in at least one of the following areas: English, social studies, second language, art, music, occupational education subjects, Regents science courses" and be awarded high school credit for such courses. In high school, the student may receive up to 6 1/2 units of credit by taking a state-approved or state-developed examination and achieving a score of 85 percent."[40]

For many years, the NY state legislature has also promoted the formation of "Excelsior Schools", originally to be a boarding program for gifted students from throughout the state.[41] Recent modifications of the proposal had limited the program to commuters from the Albany area, and current budget constraints have threatened the removal of the program altogether. New York does continue however to offer Summer opportunities for gifted and talented students.

New Jersey also continues to offer its governors school programs to high school students having just completed their junior year. In addition, the state continues to coordinate many of the activities developed in the 1980s, such as Cognetics, through its EIRC. Some districts have also begun to establish partnerships with university sponsored programs that include either providing tuition vouchers, or in the case of Secaucus, bring the program to the school. These and other "non-traditional" options will be discussed in detail at a later point in this report.

3.0 An Economic Perspective: Gifted Education in the Public Schools

As suggested earlier, a new approach is necessary in order to adequately determine the economic health of gifted education. Integral to the following analyses are the ideas that:

- Gifted education cannot be analyzed as an isolated component of a system. It must be analyzed in the context of education in general and in the sub-context of special education. (furthermore that any component of education cannot be analyzed in the absence of consideration for general economic and demographic trends.)

- The *dynamics* of gifted education must be analyzed in addition to the *statics* that have comprised the bulk of the current literature. Efforts

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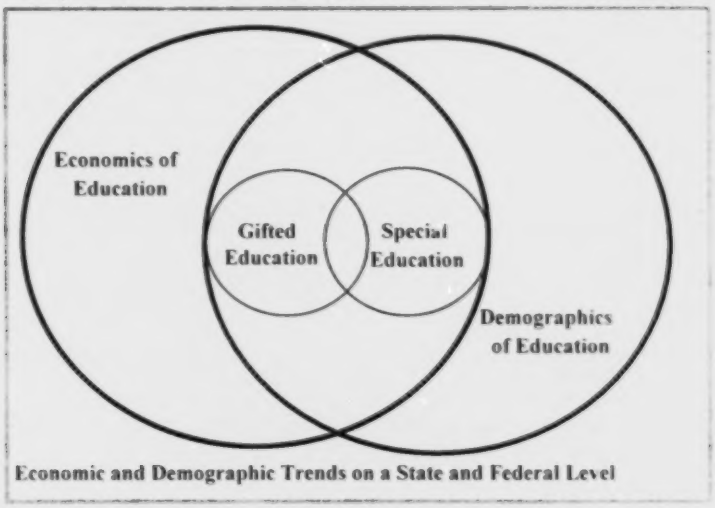
[40] Passow, H. & Rudnitski, R.

[41] Dao, James (1994) *Cuomo Urges Schools for Gifted Students.* New York Times, April 15

must be made to determine *pathmarks* for the future of gifted education.

In accordance with these assertions, the model of analysis to be undertaken in this portion of the study is represented in *Figure 1*.

Figure 1: An ecological context for analyzing the economics of gifted education


Economics of Education
Gifted Education
Special Education
Demographics of Education
Economic and Demographic Trends on a State and Federal Level

From an economic and statistical perspective, this means the use of a few simple tools.

- Consideration of general economic climate or *"When a dollar is not a dollar anymore"*: Strangely none of the aforementioned analyses included dollar value adjustments. As will be seen, this simple factor can dramatically alter the picture of "economic health" (i.e. what appears to be a stabilization of spending in NY since 1989, is in reality a decline). As a result, all dollar values represented in this study are adjusted to 1992-1993 levels according to the Consumer Price Index (acquired from DRI-McGraw Hill through NCES).

- The sub context of educational economics or *"What goes up when it seemingly should be going down"*: Although the general economy may be suffering, the same may not always be occurring in education. This will become more evident when viewing the rate of growth of general educational expenditures (in constant dollars) in New Jersey through the early 1990s. As a result, all gifted education expenditures will be assessed not in isolation, but relative to general educational expenditures.

- The role of demographics: One cannot simply be concerned with the number of students either identified or served in gifted programs without considering the numbers NOT being served or identified. As a result, all gifted population assessments presented in this study will be presented as a percent of *Average Daily Attendance* of the specified state (data acquired from NCES).

3.1 State-level spending: Longitudinal Trends 1984-1994

For each of the states, Connecticut, New York and New Jersey, state departments of education were contacted and the following data requested:

- State dollars allocated to gifted education (1984-1994)
- Per pupil allocations to gifted education (1984-1994)
- Numbers of pupils Identified and Served (1984-1994)
- Numbers of districts with gifted and talented programs (1984-1994)

In addition, the following contextual data was acquired through Vance Grant of the National Center for Education Statistics or appeared in a report entitled *Historical Trends: State Education Facts 1969-1989* (NCES):

- Total current educational expenditures for each state (state & local) (1984-1993)
- Average daily attendance for each state (1984-1994)
- Numbers of pupils served by IDEA/Chapter 1 (1984-1994)

3.11 Connecticut Spending

Chart 1 shows Connecticut's state spending levels to gifted education in constant 1992-1993 dollars. Spending levels for 1987-1989 are based on an estimated $9 million (current dollars) in allocations while gifted education was still a component of special education. Spending levels between 1989-90 and 1990-91 are based on actual allocated reimbursements to local districts. As previously mentioned, reimbursements were removed from the state budget for the 1992-1993 year, negatively impacting schools in their 1991-1992 spending years.

Assumptions based on the sliding scale of reimbursement were that slightly over 50% of gifted program expenditures were reimbursed by the state prior to 1989. When the scale was effectively halved in 1989, the assumption was that approximately 25% of local gifted program spending would be reimbursed by the state. Local level data provided by Connecticut's state department of education for school years 1989-'90 and

1990-'91 suggest rather that 19.2% and 19.8% of local level spending was reimbursed respectively.[42]

Chart 2 displays per pupil expenditures to gifted pupils as a percent of total per pupil expenditures. Gifted pupil expenditures were determined using New York state's formula for allocation. The estimated and actual total state budgets for gifted education used in Chart 1 were divided by an assumed gifted population of approximately 3% of the statewide average daily attendance. These allocation levels were compared against total per pupil expenditure data acquired from the National Center for Education Statistics. The trend displayed in Chart 2 represents the same major turning points as Chart 1, however, the percentages in Chart 2 indicate that the level of support, at its peak was a relatively small slice of total educational expenditures (approximately 10% of expenditures for 3% of the average daily attendance).

Chart 3 is perhaps most indicative of the relative changes that have occurred in gifted education spending in the past decade. As might be expected, general education funding was still experiencing positive growth (adjusted for inflation) through school year 1989-'90. In contrast, gifted education spending was just beginning its rapid decline. While general educational expenditures experienced rates of decline of only between -1.1% and -3.6% (again adjusted for inflation), gifted education expenditures were cut entirely from the state budget.

3.12 Connecticut Programs

Chart 4 indicates the number of districts maintaining programs specified for gifted and talented children in Connecticut between 1989-90 and 1994-95. Data was acquired from Dr. Alan White of the Connecticut State Department of Education and is the same as that used by Susan Pearsall of the NY Times in June of 1994. One additional year (1994-1995) of data is included, and seemingly contradicts Pearsall's expectations of an upswing. It is clear, however, that the rate of decline has level over the past two school years.

3.13 Connecticut Pupils

Chart 5 displays the numbers of students identified and/or served in gifted and talented programs as a percentage of statewide average daily attendance. In contrast with the New York Times report of significant gains (an additional 275 pupils) between school years 1991-1992 and 1992-1993, Chart 5 displays a gain of only .01% (from 2.26% to

[42]Mahoney, Brian. (1995)

2.27%). Clearly the number of pupils identified has continued to grow as a percent of average daily attendance.

Chart 6 presents an analysis of gifted students receiving special services in a the context of special education during the mid to late 1980s. Chart 6 indicates that the number of special education pupils served in Connecticut reached a five year high 5.8:1 ratio with respect to the gifted population served. Strangely, this appears to have occurred as a result of a one year decline in the number of gifted pupils served rather than a rapid growth in the special education population. In fact, in the same year the number of special education students served declined slightly (-0.5%) and continued to decline through 1988-1989.

According to Thomas Parrish of the Center for Special Education Finance, Special education expenditures (and related services) in Connecticut for the same year totaled over $414 million, approximately 15% of the state's total educational spending. [43] The majority of this funding was allocated at the state (38.89%) and local (56.37%) levels. It might be expected then, that since pupil ratios were on the order of 5 to 1 (IDEA & Chapter 1 to Gifted and Talented) that expenditures for gifted and talented, since they were reimbursed on the same scale as special education expenditures might equal approximately 20% of the state allocations to special education. This would have provided gifted education with approximately $32 million dollars at the time, when in reality, estimates suggest that expenditures to gifted education were approximately $9 million.

3.21 New York Funding

New York state continues to be among the region's strongest financial supporters of gifted education. Yet even New York has not been immune to the decline of the field in recent years. New York's losses in gifted education have been somewhat masked by the fact that per pupil allocations have been provided as a flat grant rather than as a percent of expenditures over time. Although total spending and per pupil spending grew rapidly in the 1980s, that stagnation of spending levels since 1988 has resulted in a gradual decline in the economic health of gifted education in New York since that time. Chart 7 displays both the rapid increase in total budget in the 1980s and the subsequent gradual decline throughout the first half of this decade (all dollars represent constant 1992-1993 dollars).

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[43] Determined according to total state expenditures reported by NCES in "Historical Trends: State Education Facts 1969-1989" and reported expenditures of $414,328,000 for special education according to Parrish, Thomas. (1994) *The current federal role in special education funding*. Center For Special Education Finance

Chart 8 displays the similar trends that have occurred in per pupil spending levels as a percent of total per pupil expenditures, yet indicates even more rapid and consistent growth throughout the early 1980s. Here the rate of decline appears to be increased by the relative growth in total per pupil expenditures. Gifted and talented per pupil expenditures decreased from nearly 3% of total expenditures to 2.2%, or a relative loss of nearly 27% over the six year period from 1986-87 to 1992-93. The decline extends back to the period when the flat grant was only increased from $192 to $196.

New York is the only state presented in these analyses for which there appear not to be major discrepancies between total education spending practices and gifted education spending practices. While education in the state was experiencing overall growth in spending in the early 1980s, perhaps a result of the 1980s reform movement, allocations to gifted education experienced significant growth, primarily a result of program start-up. Unlike New Jersey and Connecticut, however, as total spending began to level off in the late 1980s and early 1990s, spending for gifted and talented programming experienced losses equal only to the deflation rate of the dollar. Chart 9 displays the comparison between change in total educational expenditures with change in state allocations to gifted education from school year 1984-'85 through school year 1992-'93.

3.22 New York Pupils

Tracking numbers of pupils participating in New York's gifted and talented programs has been somewhat more of a difficult task. Chart 10 displays numbers of pupils identified and served in gifted programs as generated by two separate sources. John Curley's data, which is used for the period between 1983-'84 and 1987-'88 shows significantly smaller total numbers because the states largest five districts were not included in his study. Curley's technique approximately halved the state's total student population. It is impossible, however, to make assumptions about the level of participation in this districts based on the others in the sample due to the extent of characteristic differences of these districts (New York City, Yonkers, Buffalo, Syracuse and Rochester). Data for school years 1988-'89 and 1992-'93 was obtained from the "State of the States" reports (1987, 1994) on education of the gifted and talented and reflect the total number of students served state-wide.[44] Though it is questionable what occurred between the years 1988-'89 and 1992-93, there is a marked net loss over the period relative to total average daily attendance.

Like the previous two disjoint analyses of New York state, what is most interesting about Chart 11 is what is not included. Comparing gifted and talented pupils served in only half of the state's population with IDEA/Chapter 1 pupils for the entire

[44] Council of State Directors of Programs for the Gifted.(1987, 1994) *State of the States Report.*

ADA, yields not only a low ratio of less than 4:1, but a ratio that declines to nearly 3:1 over the period from 1983-'84 to 1987-'88. When numbers are employed that account for the entire state's gifted population, a ratio of only 2:1 exists. Although a ratio of only 3:1* existed among special education to gifted education students in 1987-1988, state spending on special education exceeded $1.5 billion dollars compared to 13.3 million for gifted education for a ratio of 118:1.

3.31 New Jersey Funding

Although New Jersey's state level of spending on gifted education is perhaps negligible throughout the policy period being analyzed, it does perhaps reflect the philosophy of the state department of education toward its own dissemination model for programs for the gifted. Like New York, gifted expenditures were never provided the benefit of being allocated according to dollar value. Static competitive grants remained available through school year 1991-1992, when they were cut entirely, as the legislature attempted again to reshape a budget to meet the constraints of ongoing equity litigation. Chart 12 shows the gradual, then rapid decline of New Jersey state spending on gifted education throughout the policy period.

Interestingly in New Jersey, each of the major cuts in gifted and talented funding came against significant growth in total educational spending (adjusted for inflation). The losses to gifted education in New Jersey are clearly disproportionate in the years of each of the cuts. Although it can be argued that competitive grants to gifted education and regional coordinators were relatively small to begin with, and their elimination should not have a significant impact, it can also be argued that such small cuts to the total budget provide only minimal savings. Chart 13 displays changes in total educational spending in New Jersey compared with changes in state allocations to gifted education.

3.32 New Jersey Pupils

Available data for New Jersey pupils participating in gifted and talented programs was sparse at best. Between 1986-'87 and 1988-'89 the New Jersey State Department of Education reported a gain from 9.9% to 11.3% of the total school population participating in gifted and talented programs. Employing average daily attendance as reported by NCES, in place of total school population the percent of gifted pupils served exceeds 12%. In a recent conversation with Ted Gourley, former state director of gifted education, currently with the Education Information Resource Center, Dr. Gourley estimated that approximately 80,000 students are currently served in gifted and talented

* note that this ratio is artificially elevated by the non-counted Gifted and Talented pupils in the five largest districts

programs, which would equal approximately 7.6% of the 1992-1993 average daily attendance. Chart 14 displays the sparse comparisons available for New Jersey throughout the policy period.

At its peak, gifted education in New Jersey in the late 1980s closely rivaled special education in numbers of pupils served. Chart 15 displays that the ratio of IDEA and Chapter 1 pupils to gifted and talented pupils served had dropped below 1.5:1 by 1988-'89. This ratio is significantly lower than either of New Jersey's tri-state counterparts. While New Jersey has been weak on state support for gifted education, more than 78% of special education dollars in 1987-'88 came from the state. Total expenditures (federal, state and local) to special education exceeded $500 million dollars in 1987-'88, yielding a state share of $394.8 million.

4.0 An Economic Perspective: The Rise of Private and University Programs for the Gifted

Around the time of the surge in growth of gifted and talented programs in the public schools, came the birth of numerous private and university sponsored programs for gifted and talented students. Perhaps linked to the national interest raised by the *1972 Marland Report* Universities such as Johns Hopkins University in Baltimore Maryland began conducting extensive research on gifted and/or precocious youth. Ultimately, these studies, including Dr. Julian Stanley's longitudinal study of Mathematically Precocious Youth led to the development of weekend, after school, and eventually Summer residential programs for gifted and talented students. The following analyses will focus on three such programs in the Northeast: Johns Hopkins Center for Talented Youth; College Gifted Programs *Summer Institute for the Gifted*; and Montclair State University's *Academically Gifted and Talented Youth Program Center*.

Each of these programs were founded in the late 1970s or early 1980s, when gifted education in the public schools in the Northeast was apparently achieving its greatest growth. Each of these programs require tuition to attend, ranging from $400 for a semester at Montclair State to $2,150 for three weeks in residence at *The Summer Institute for the Gifted*. Financial aid offered by the programs is minimal. Overall, the growth in these programs has been phenomenal. It might be assumed that the growth in interest in gifted education spurred this growth in the 1980s, but it might also be assumed that due to the relative strength of public school programs at the time, there was less of a need for supplementary programs.

Considering both economic and political circumstances, the early 1990s should have clearly been the most difficult time for these programs. One might assume that since homogeneous groups within classrooms, and homogeneous classes within schools

had been tagged "politically incorrect", there would be little interest in supporting an entirely homogeneous summer program or weekend school. In addition, it could be expected that the rising tuition levels of these programs would have had a negative impact on enrollments during the economic recession of the early 1990s. In the analyses that follow, however, none of these factors seem to have had a negative effect on the programs observed. Quite to the contrary, the reform movement of the early 1990s seems to have stimulated the rapid growth of gifted education in the private sector.

College Gifted Programs

Chart 16 displays the growth of *College Gifted Programs: Summer Institute for the Gifted* in both student enrollment and tuition levels (in constant 1992-'93 dollars) from 1984 through 1994. Originally affiliated with Montclair State University, *College Gifted Programs*, under the direction of Dr. Carl Gottschall and Dr. Phil Zipse, opened its first three week Summer boarding session in 1984 at Blair Academy in New Jersey. Dr. Albert Dorhout, one of New Jersey's then former regional coordinators for gifted education assisted in the development of the program. Since the opening of the first campus in 1984, three additional sessions (Newtown, PA 1986, Bryn Mawr, PA 1990 and Poughkeepsie, NY 1991) have been established, now housing an average of over 250 pupils each per Summer. In 1994, the Blair Academy session was moved to Drew University in Madison, NJ. The majority of students attending the program over the years have been public school students from New Jersey, Pennsylvania and New York respectively. Enrollment of Connecticut students has increased since the opening of the Vassar College session in 1991.

Perhaps what is most interesting, is that the program experienced its greatest growth during both the reform movement and the economic recession of the early 1990s. In fact, the program was able to establish two entirely new sessions (the largest two) during that time despite tuition levels, which were already the highest of any program of its kind, and continued to increase at a rate greater than inflation.

Johns Hopkins University: Center for Talented Youth

In 1980, Johns Hopkins University offered its first Summer academic program for highly able middle school students. Just over one hundred students participated in the first year of the program which was run under the auspices of the *Office of Talent Identification and Development* (OTID) and the *Program for Verbally Gifted Youth*

(PVGY).[45] Advanced courses in mathematics were already being offered by the university through its *Study of Mathematically Precocious Youth* (SMPY) which was founded in 1971 by Dr. Julian Stanley.[46] In 1981, 221 students participated in the second CTY Summer session held at St. Mary's College in Maryland. By this time, the annual OTID/PVGY talent search had grown to 15,000 students. Among OTID's early experiments (1981) was an arrangement with the Delaware State Board of Education to provide advanced math and science courses. In 1982, the program was expanded and relocated to two campuses in Pennsylvania (Dickinson College, Carlisle and Franklin & Marshall College, Lancaster) and the commuter program was continued at Johns Hopkins University. In 1983, OTID officially became CTY, again offering two residential programs and expanding commuter services into New Jersey (Newark Academy, Livingston) and California (Windward School, Los Angeles).[47]

Since the early 1980s CTY Summer programs have experienced remarkable growth. Chart 17 displays both enrollment growth and tuition increases for CTY's "older students" (grades 7+) residential programs from 1982 to 1992. In more recent years CTY has opened "Young Students" (grades 4-6) residential programs, the first of which was held at Goucher College (MD) in 1992. An additional "Young Students" site was added in 1994 at Connecticut College (New London). Since the opening of the "Young Students" programs, enrollments in these sessions alone have grown to 1,700.[48] Like *College Gifted Programs* this rate of growth seems to contradict both the political sentiment of the times and the economic climate. Given the picture painted of the Connecticut economic climate of the early 1990s, few in business would have considered Connecticut as a likely location for expansion, yet this proved to be a highly successful venture for CTY.

Chart 18 displays the number of students participating in the annual CTY Talent Search from 1982 to 1992. The talent search process is generally considered to be the selection process for CTY's Summer residential programs, but many students participate in the process for other reasons, including personal status, or admission into other similar programs. Due to these peculiarities, Talent Search participation does not always reflect trends in actual program enrollment. Here, there appears to be some decline concurrent with the height of public school programming for the gifted. The decline, however, makes

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[45] Corazza, Luciano. *1992 Academic Programs Report: A Brief History of CTY's Academic Programs.* Center for Talented Youth. Johns Hopkins University

[46] Renzulli, Joseph. (1986) *Systems and Models for Developing Programs for the Gifted and Talented.* Creative Learning Press. p. 3

[47] Corazza, Luciano. (1992)

[48] Kramer, Art. (1995) Director of CTY Academic Programs. *Personal Communication.*

a rapid turn around between 1988 and 1990 and continues through the close of the data in 1992.

Chart 19 and Chart 20 are perhaps the most revealing for the context of this study. Each of the charts displays significant increases in students being sent to CTY Summer programs from the Northeast as a region, and Connecticut, New Jersey and New York in particular. In fact, Connecticut, New Jersey and New York all rank in the top ten as sending states (1987-1992) not only to CTY's programs in Pennsylvania, New York and Massachusetts, but also to CTY's program in Geneva, Switzerland. [49] New York and New Jersey place in the top ten as sending states for CTY's Redlands, California program. Chart 20 displays the outstanding rate of growth in regional participation for the Mid-Atlantic states and relative significant increases in participation in New England States. Specific data for Connecticut, New York and New Jersey are presented in Table 1. Each state ranks in the top eight in increased participation from 1987-1992.

Table 1: Top eight states for increases in enrollment to CTY Summer programs (grades 7+) 1987-1992

State	Percent Increase
Massachusetts	92%
California	55%
Pennsylvania	45%
Connecticut	**43%**
New York	**42%**
New Jersey	**38%**
Maryland	30%
Virginia	23%

Montclair State University: Academically Talented and Gifted Youth Programs Center

Montclair State University, formerly Montclair State College, began their programs for academically talented youth in the early 1980s under the direction of Dr. Carl Gottschall and Dr. Phil Zipse (founders of College Gifted Programs). Until the early 1990s, the program remained affiliated with *College Gifted Programs*, and continued to offer both weekend semester programs and Summer commuter programs. Since the separation of College Gifted Programs from Montclair State University, competition for Summer enrollments has increased. This may in part explain the relatively soft, and

[49]Corazza, Luciano (1995)

widely fluctuating enrollment figures seen in Chart 22. In fact, in the Summer of 1994, no session was offered at Montclair State University for the first time in twelve years.

In recent years, Dr. Richard Taubald of the department of Continuing Education at Montclair State University has assumed responsibility for the Academically Gifted/Talented Youth Programs and has begun to make attempts to revitalize both the Summer session and the weekend semester program, which by comparison with their residential counterparts at *College Gifted Programs*, have not experienced the expected rate of growth. Chart 21 displays the enrollment and tuition levels for the Weekend Semester program at Montclair State University. Although a steep decline is apparent from 1991 through 1994, enrollment figures for the 1994-1995 school year rebounded to 1,056 from the previous year's 915 and the Summer session was reinstated with an enrollment of 56 pupils.

The Montclair State University programs are without question the most affordable option for many parents, but they have not reaped the benefits of the decline of public school gifted and talented programming to the same extent as the Summer residential programs. Many factors may be responsible for the lagging growth of the MSU programs. As a commuter program, MSU relies primarily on New Jersey enrollment, although limited numbers of students do travel to the program from New York State. By the previous analyses, New Jersey seems to have been affected significantly less than Connecticut, and perhaps even New York by the decline of state-level gifted education funding to the public schools.[50] New Jersey has also lagged behind its tri-state counterparts in sending rate growth to residential gifted programs.[51] In addition, the reorganization of the Montclair State Academically Gifted/Talented Youth Programs over the past few years has played a significant role in the program's ability to attract new students. What becomes apparent by comparison of MSU, CTY and SIG, is that tuition levels seem to play an insignificant role in enrollment growth. It can therefore be assumed that the clientele currently being served by private and university programs is one for whom substantial disposable income is readily available.

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[50]New Jersey is the only state of the three which never provided per pupil allocations for gifted in the first place, therefore its losses in the early 1990s were insignificant.

[51]Refer to Table 1, CTY's top eight states for increase in sending rate (1987-1992)

5.0 Policy Options

Public School /University Partnership Models: The Montclair State Experiment

Bringing the Program to the Schools

In 1994, Pat Cocucci of the Secaucus (NJ) Public School requested a proposal from the *Academically Gifted and Talented Youth Programs Center* (AG/TYP) at Montclair State College to "provide academically gifted students in grades 4-6 from the town of Secaucus with a supplementary mathematics/science and humanities experience."[52] In response, Dr. Richard Taubald of AG/TYP arranged two four day sessions in which professors from Montclair State University, involved with the AG/TYP summer and weekend programs traveled to the Secaucus school district to implement differentiated curricula designed within the AG/TYP programs. The professors from the program worked with students from 9-12 noon on "Experimental Chemistry" and from 1-4pm on a minicourse entitled "Legendary Figures of the Middle Ages."

Although limited in scope the first time around, the arrangement between Secaucus and AG/TYP emphasized the ability of a local school district to make use of existing "market tested" opportunities for gifted and talented pupils. Within their 1995 brochure, AG/TYP lists 45 such enrichment or accelerative opportunities for gifted children in grades 4 through 10. The ability of a school district to pick and choose from available opportunities and pre-trained faculty significantly reduces the difficulties associated the development and implementation of an in-house gifted program, and selection of a program coordinator.

Unfortunately, the expansion of such a program would require that fees and expenses be attached to support the program's staff and materials costs. For districts unable to fully support in-house programs, the required investment may, however, be accessible. For example, if AG/TYP were to provide stipends per course of as much as $1000 and consider the inclusion of a materials fee of up to $200, a local school district could run up to 30 such mini-courses (a total of 360 instructional hours/2 hours per school day) in one school-year for less than the cost of an additional staff member. Ideally, schools should initiate such a program in addition to rather than in place of other opportunities. Although the fee for service indicated here is high, districts who could not afford the additional staff in the first place, would most likely opt for far fewer than 30

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[52] Taubald, Richard. (1994) *Program Proposal to the Secaucus Public Schools.* Montclair State University, AG/TYP

mini-courses. In addition, it is unlikely that costs would need to be as high as expressed here, and package deals of 10, 15 or 20 courses may be arranged at decreased cost.

In order to provide an incentive for state colleges and universities to implement such programs, it could be suggested that the state re-introduce even its previous level of spending ($200,000) in support to these programs in order to decrease the cost to local districts. Under ideal circumstances, this aid should be applied to supplement program costs for area districts with the greatest need. The general framework for this model may be applied throughout the region where university run programs already exist, or where interest is significant.

Tuition/Transportation Vouchers for students in nearby districts

Perhaps one reason that the plaintiff's request in Ellis v. Chester Upland School District was not covered by Pennsylvania's mandate for special education was the potential for exorbitant costs to be incurred by local school districts in making numerous out of district placements for gifted children for full year programs. Under ideal circumstances, funds would be available to support these full-year placements for all gifted children. It is more feasible, however to consider the possibility of providing much smaller "vouchers" for identified students to participate in accessible weekend or after school programs. Dr. Richard Taubald of AG/TYP indicates that several students in recent years have been sent to the AG/TYP weekend program on tuition credit offered by area school districts. The following policy option uses the troubled Paterson (NJ) school district to display an example of how a tuition voucher model may be used to provide cost effective opportunities for gifted, yet predominantly disadvantaged children.

In 1992, the Paterson, NJ school district housed just over 24 thousand pupils. In 1991, the Paterson School district was taken over by the State of New Jersey for, among other things mismanagement. The student population is predominantly African American (36.1%) and Hispanic (40.5%) and generally of low socioeconomic status. Despite an apparent community apathy toward education in general in Paterson, a recent parent survey identified *gifted education* as one of the primary concerns of parents in the district.[53] The current fiscal circumstances in Paterson have made it difficult, at best, to provide students with opportunities outside of the basic curriculum. Due to the socioeconomic status of the majority of Paterson's residents, few would be capable of paying for supplementary programs for their children on their own.

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[53] Wilson, Lavall. (1992) *Paterson Public Schools: Questionaire Items Related to district Curriculum Issues Or Concerns.*

Table 2 displays the cost of sending Paterson students to the *Academically Gifted and Talented Youth Programs* at Montclair State University just a few towns away. The tuition credit level of $400 represents the full tuition for one semester of the program. This cost could be substantially reduced either by the program offering reduced rates to Paterson for larger groups of students or by the state providing supplementary grants to AG/TYP to provide programming for low wealth school districts.

Table 2: Cost of sending G&T pupils to a Saturday enrichment program

Percent of ADA Served	Tuition Credit	Transport Credit	Total Tuition	Total Transport.	Total Cost to District (% total budget)
3% (727)	$400	$100	$291,156	$72,789	$363,945 (.16%)
5% (1,213)	$400	$100	$485,260	$121,315	$606,575 (.26%)

Table 2 represents what is clearly the most expensive case scenario, yet even under these circumstances, Paterson would be able to send more students than AG/TYP could accept, for an apparently negligible slice of the total district budget.

Public School - Private Program Partnership (CTY/SIG) for residential placements

Although more expensive, the Summer residential opportunities previously described also provide the type of enrichment activities, or accelerated academics that may be necessary to retain the interest and enthusiasm of the more profoundly gifted child. In addition, these programs provide a type of social interaction that does not always exist during the school year, especially for those from deprived families, attending deprived public schools. Among other things, the atmosphere of these programs promotes:

- a student generated enthusiasm for academic success, and reinforcement by peers that its OK to do well or to be smart
- a student generated desire to think and interact on a higher intellectual level in and out of the classroom

In general, this type of opportunity encourages even the brightest students to realize that it is always possible to improve on one's performance. As is the case with residential placements for students with severe disabilities, "vouchers" or tuition credits for these residential programs should perhaps be used more sparingly for, among other reasons, cost. Yet, as well as providing the benefits of the residential atmosphere, the existence

of these programs opens the door to students in school districts without local access to a program similar to the AG/TYP.

An Overarching Principal: Achieving Equity through Funding

As is evident in John Curley's research on *Financing Programs for Education of the Gifted in New York State* flat grant allocations do little to help those school districts that cannot afford to make up the difference. Curley's research displayed that, in New York State, local funds made up 80% of total funds for Gifted Education in 1987-'88 and that high-wealth districts were able to spend twice the amount of local funds as low wealth districts, a disparity which has only increased since. Among the three states analyzed, only Connecticut appropriated funds according to town wealth. This policy, even when funds were reduced to a 5-35% scale, provided for substantial assistance to some of the state's poorer communities.

Hartford, for example would have received 60% fewer funds in 1991-'92 had Connecticut allocated funds according to New York's flat grant formula. (See Table 1). Greenwich, with a property wealth per pupil of over $2 million received just over 5% support from the state and was still able to spend nearly $2 million dollars on gifted education in 1991-'92. Sterling, a poor rural district, with a property wealth of only $289,082 per pupil received 34.5% reimbursement for gifted education from the state. Under New York's flat grant program, Sterling's losses would have equaled nearly 80% of the town's state allocation. The Connecticut model, however, is based on the contingency that individual towns will choose to spend on gifted education.

One reason that Connecticut's previous formula was not entirely equitable was that it was highly dependent upon a district's choice to spend on gifted education. Bridgeport, in Table 3 chose to put forth a relatively small local effort, and although they received nearly 35% state support, they received significantly less than they might have under New York's model, had they chosen to participate. Greenwich, among the highest wealth towns in the state was able to acquire significant funding from the state by spending significantly at the local level. Under the New York model, Greenwich would have received 60% less in state funding, however, the total losses to the district would only equal 3% of its total budget for gifted education compared to a potential 27.5% of total budget loss for the previously mentioned Sterling school district.

Table 3: What-if analysis - comparison of flat grant (NY formula) and wealth based allocations for Connecticut towns.

Sample Connecticut Town/City	*Reimbursable Expenditures (1991-'92)*	*Connecticut State Share*	*What if: New York Formula*	*Gain Loss (%)*
Bridgeport	$146,501	$50,235	$121,980	state: +140%
				total: +49.0%
Ansonia	111,573	36,462	14,030	state: -61.5%
				total: -20.1%
Sterling	44,051	15,180	3,058	state: -79.9%
				total: -27.5%
Hartford	1,254,882	387,633	153,914	state: -60.3%
				total: -18.6%
Greenwich	1,985,822	106,440	40,272	state: -62.2%
				total: -3.33%

John Curley's research on New York state, the results of the brief analysis presented in this section, and the rapid growth of private tuition-based programs for the gifted each point to the need for wealth based distribution of funds for gifted education. The connection between the ability to receive and the ability to spend, however, needs to be eliminated (but not by elimination of the program altogether, as in the case of Connecticut). Even in the best of times for gifted education in the Northeast, it was clear that the student with the smallest chance of receiving a "free and appropriate" education was the *"gifted/economically disadvantaged"* child. Perhaps this is more true now than ever before.

As a result, it should be seriously considered that wealth based distribution of funds be applied to any or all of the previous policy options. Implementation of this policy may take the following forms:

General Policy: State Support for Gifted Education

- distribution of funds to districts according to local capacity, not local effort

Summer Program/Weekend Program Voucher Models

- distribution of vouchers based on individual need (sliding scale according to personal disposable income)

- increased involvement of universities and colleges in partnership ventures with public schools, particularly those schools or districts in need
- State support to model university and private programs to supplement costs of providing programs to low-wealth districts and pupils

Should we continue to ignore the plight of the "gifted poor" or even the "gifted middle-class" by suggesting, as we have, that our current educational system and its philosophies provide what is "best for all students", then we will continue to support the economic segregation of our region's and nation's "best and brightest" students. "Special opportunities" whether they be the enrichment offered by *The Summer Institute for the Gifted* or accelerated classes offered by *The Center for Talented Youth* will continue to be left to those who can afford them. This coincides with the fact that public school districts most likely to support gifted and talented programs will continue to be those in the "right neighborhoods" that have the local dollars to spend.

6.0 Conclusions and Recommendations

It is clear from the historical perspective presented in this report that gifted students possess few, if any of the legal rights or privileges of other special populations. As a result, gifted education funding continues to be disposable at the state or municipal level. Although the blame for cuts to gifted education has been placed on the "fiscal crisis", both Connecticut and New Jersey implemented their first major cuts to state level funding against increases in general education expenditures that were +6% above inflation. In each case, these cuts resulted in significantly fewer pupils being served over time. The school districts that suffer most from these cuts are lower wealth districts, or those districts that are more dependent on state support to keep their programs intact. As previously indicated, it is in these areas, where the population is more likely to be of low socioeconomic status, that publicly available opportunities are most needed. As can be seen by the growth of private sector programs, the only right currently afforded to the gifted child is the right to a "costly and appropriate" education. With few exceptions, this is a right that is not widely available to students in lower wealth school districts.

In order to begin to revitalize the field of gifted education in the Northeast, and support the rights of the gifted child, the following measures should be given serious consideration:

- Develop state level policies, or Federal Guidelines that will ensure rights for gifted students
- Encourage creative, economically efficient opportunities that bring together the best of the public and private sectors
- Develop standards of horizontal equity that will ensure that gifted children, regardless of their socioeconomic status can attain a "free and appropriate" education

Although the policy options presented in this report seem to indicate that gifted students needs can all be met simply by contracting out the necessary services, the importance of designated personnel at the district or building level cannot be emphasized enough. The "joint venture" options presented are intended to: 1) stimulate involvement in districts where there were NO opportunities to begin with and 2) provide cost effective supplementary opportunities in districts where gifted programs currently serve only limited numbers of pupils. To ensure that even these opportunities occur, or are distributed equitably among students, there continues to be a need for advocacy for the gifted child within the schools.

Perhaps due to the lack of unity among the leaders of gifted education itself, policy makers have been able to selectively extract the philosophies of the field that best suit their political or economic agendas. Yet, just as *inclusion* of special education students does not mean that the special population no longer exists, inclusion in gifted education, as promoted in Renzulli's *Schoolwide Enrichment Model* or in *National Excellence*, does not mean that gifted pupils, as a special population no longer exist. Perhaps like no other population in our schools, rights and opportunities for gifted students are entirely a matter of legislative convenience. One can only hope that the legislators of our future will be the gifted students of our present, and that they will choose not to do for others what was done for them.

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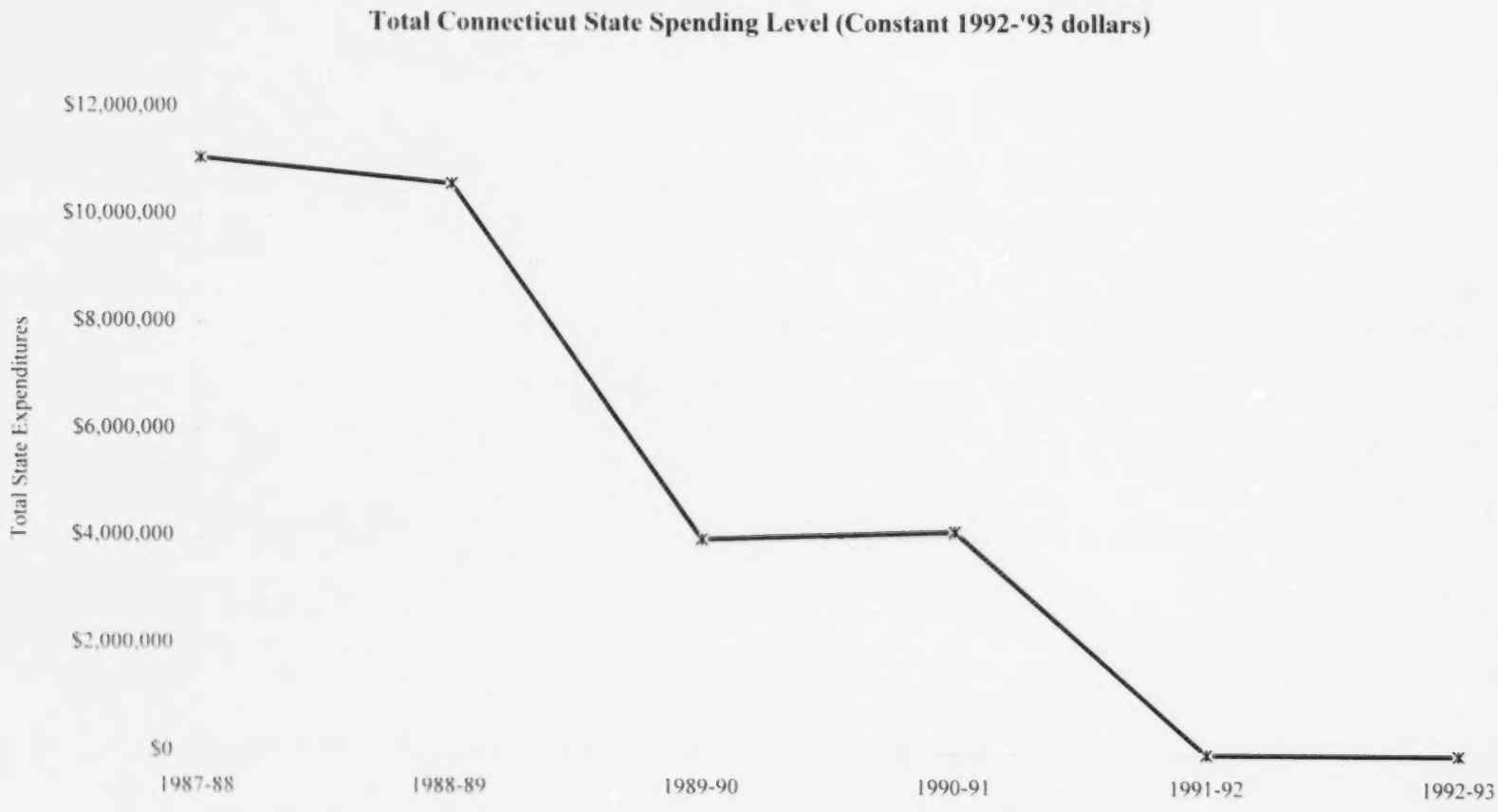
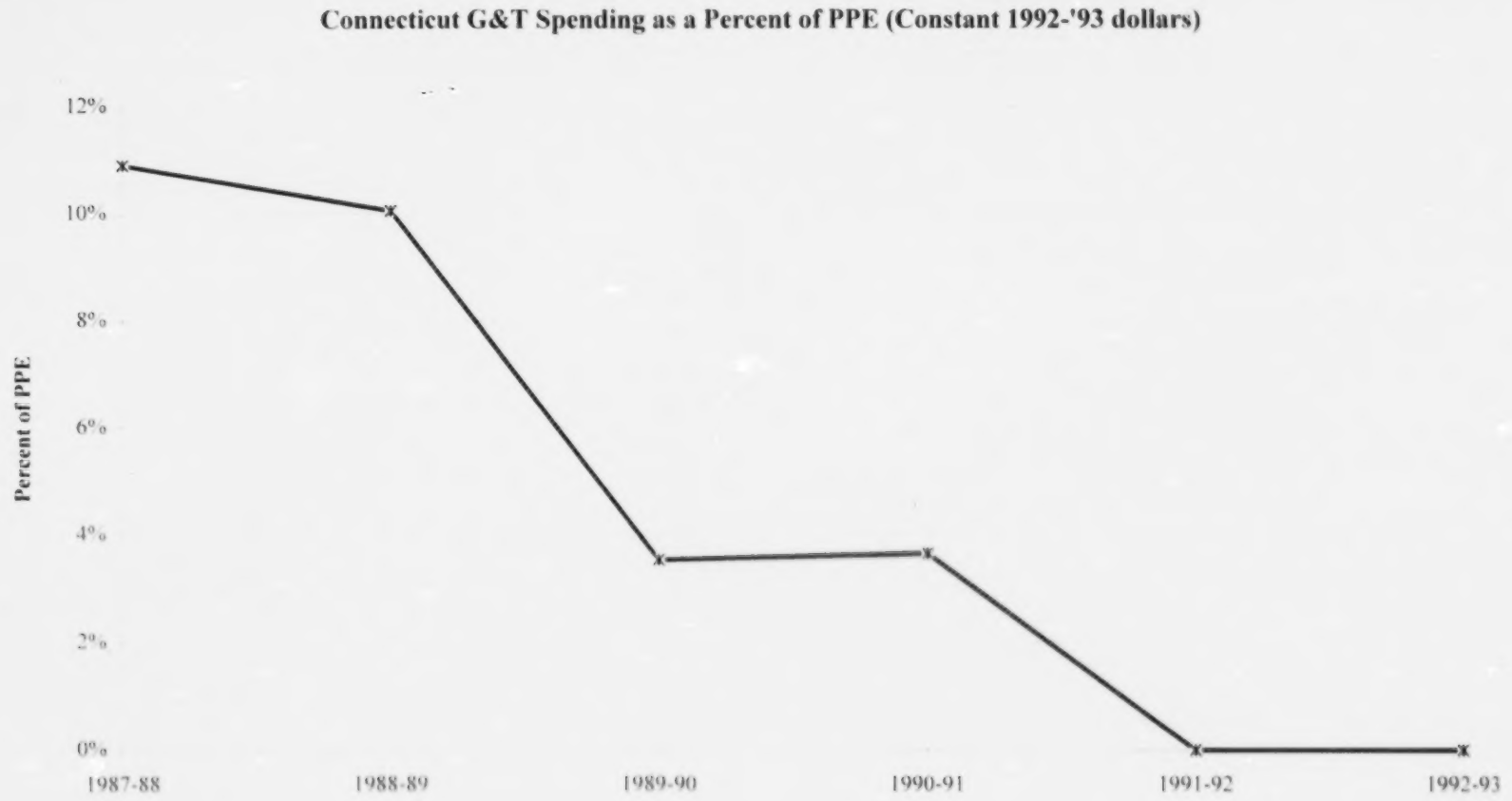
Chart 1: Total state spending levels for gifted education in Connecticut based on estimated (1987--1989) and actual (1989-1991) reimbursements



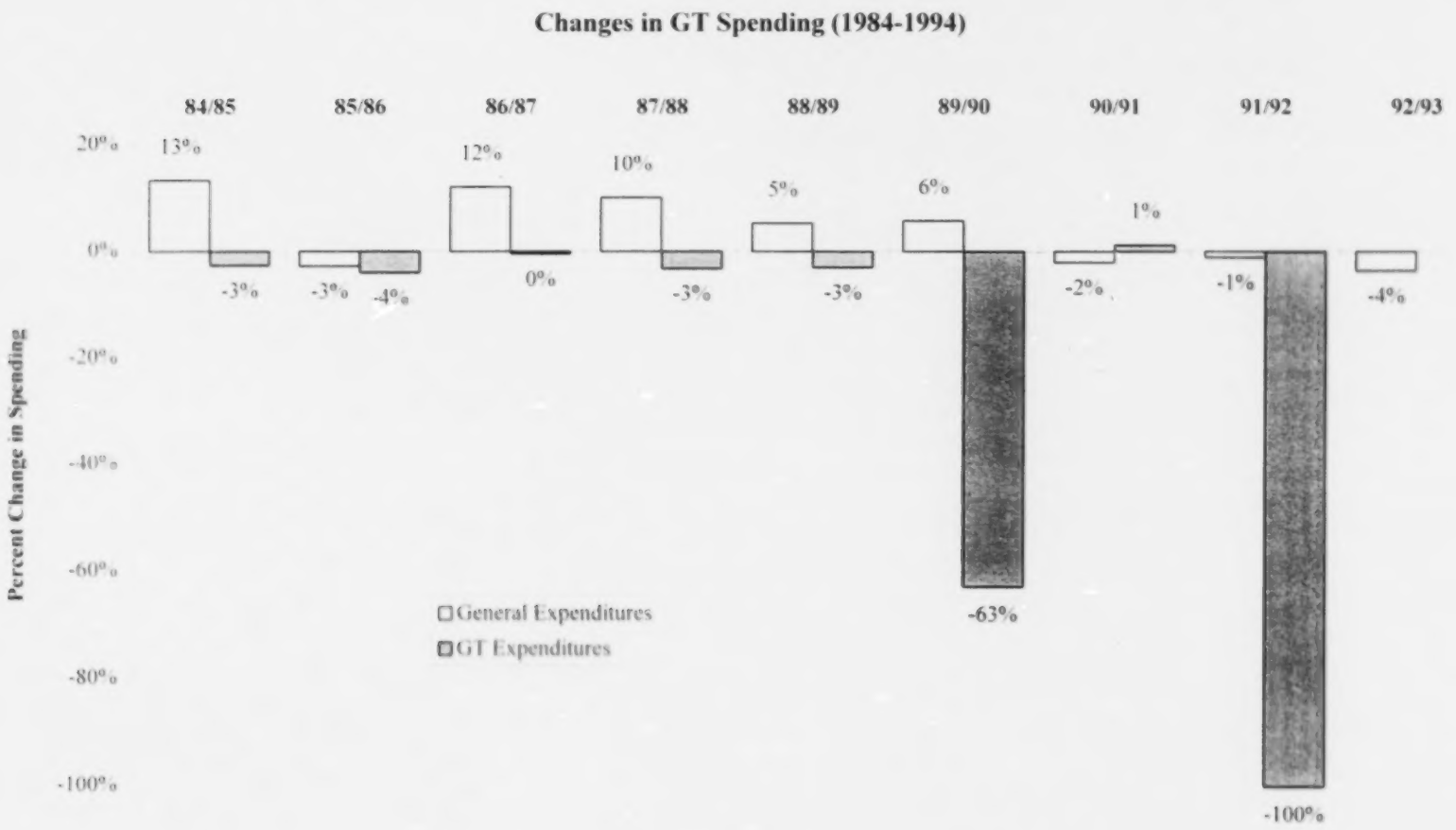
Source: Connecticut State Department of Education

Chart 2: Per pupil spending levels for gifted education based on 3% of state total FTE and total per pupil expenditures



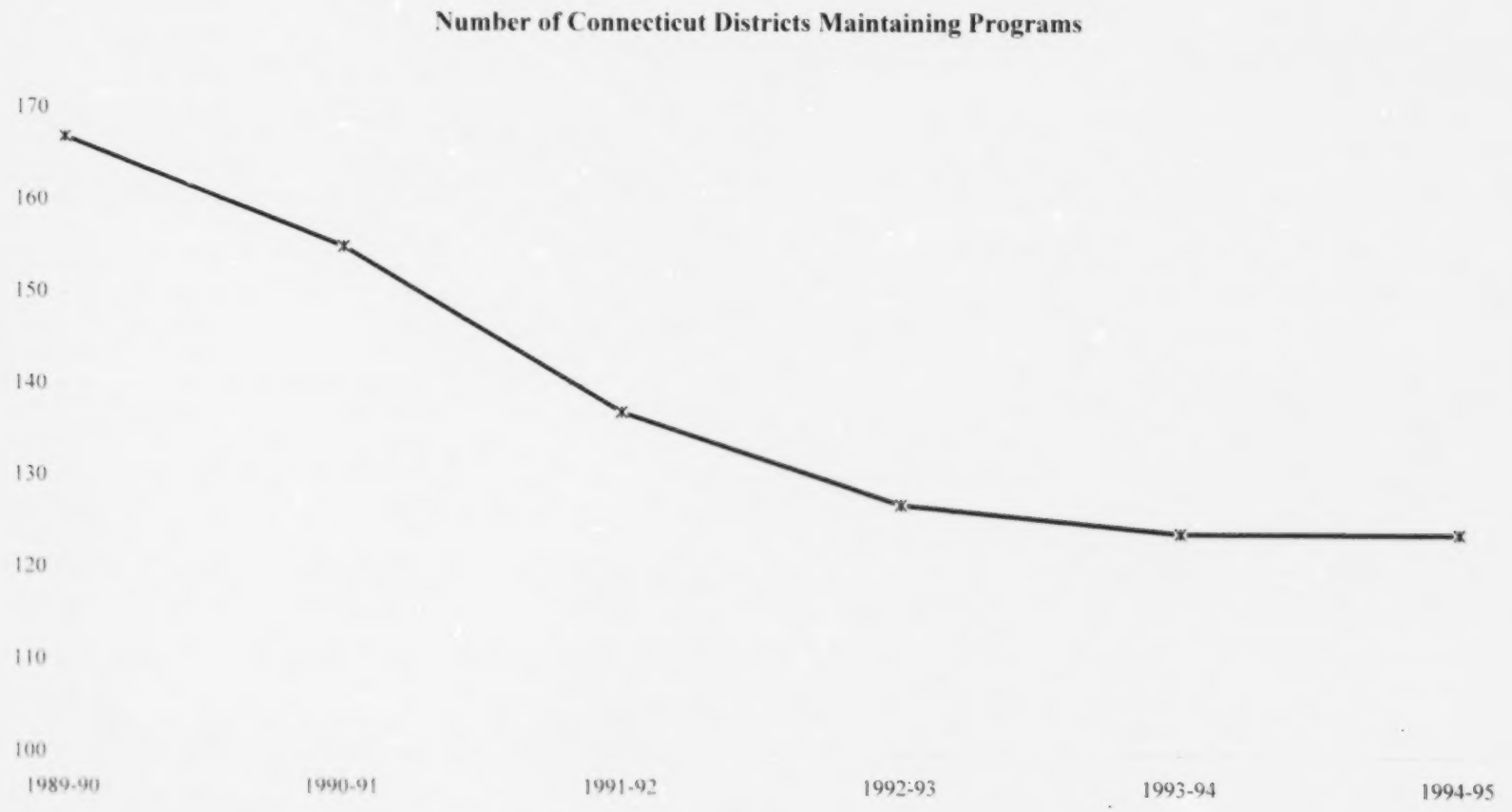
Source: CT State department of education and The National Center for Education Statistics

Chart 3 Comparison of changes in state level gifted education spending in Connecticut and total educational spending (Constant 1992-'93 dollars)



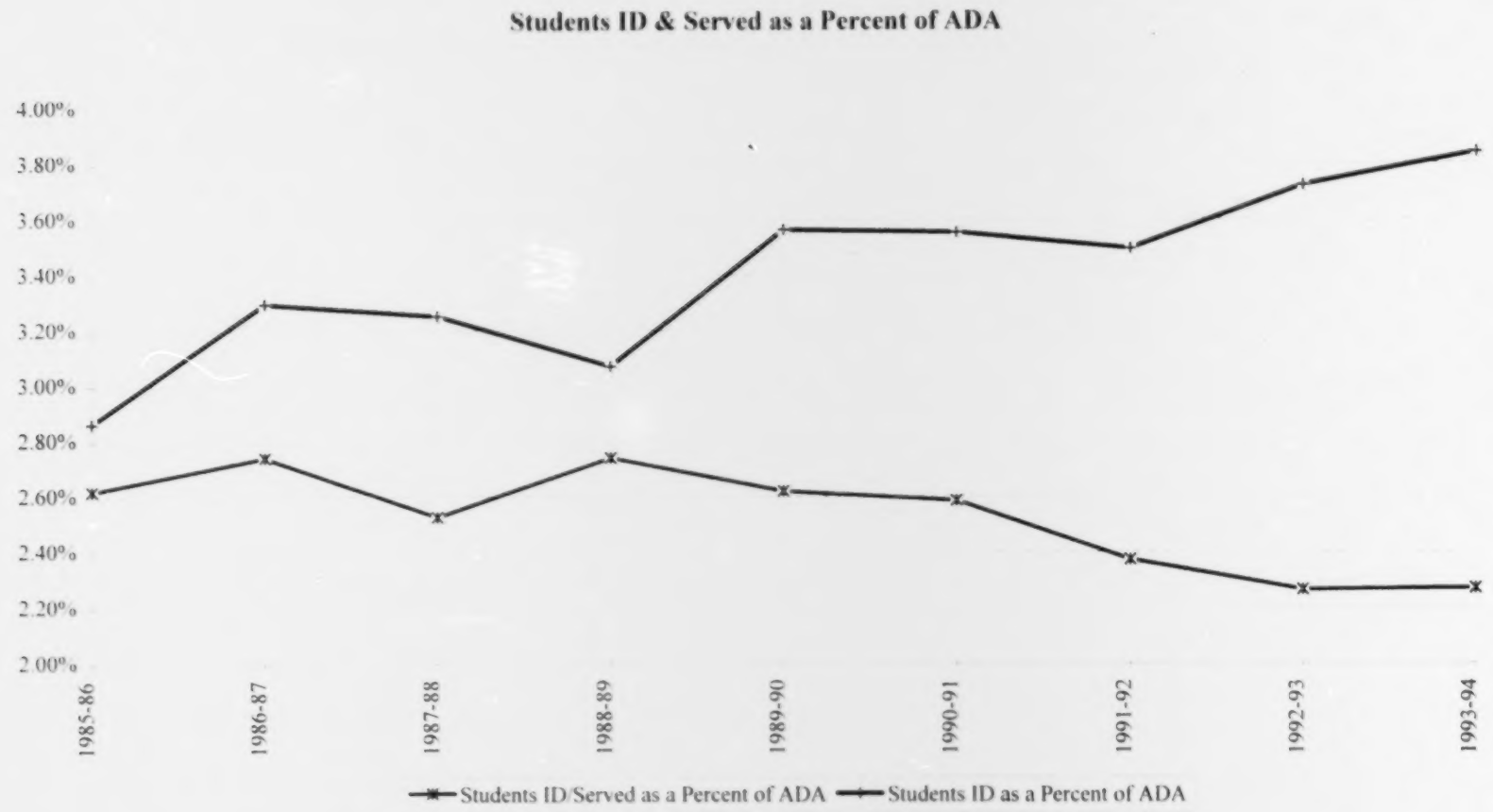
Sources: CT State Department of Education and National Center for Education Statistics

Chart 4: Total number of Connecticut school districts supporting programs for the gifted (total number of districts in the state has remained relatively stable at 169)



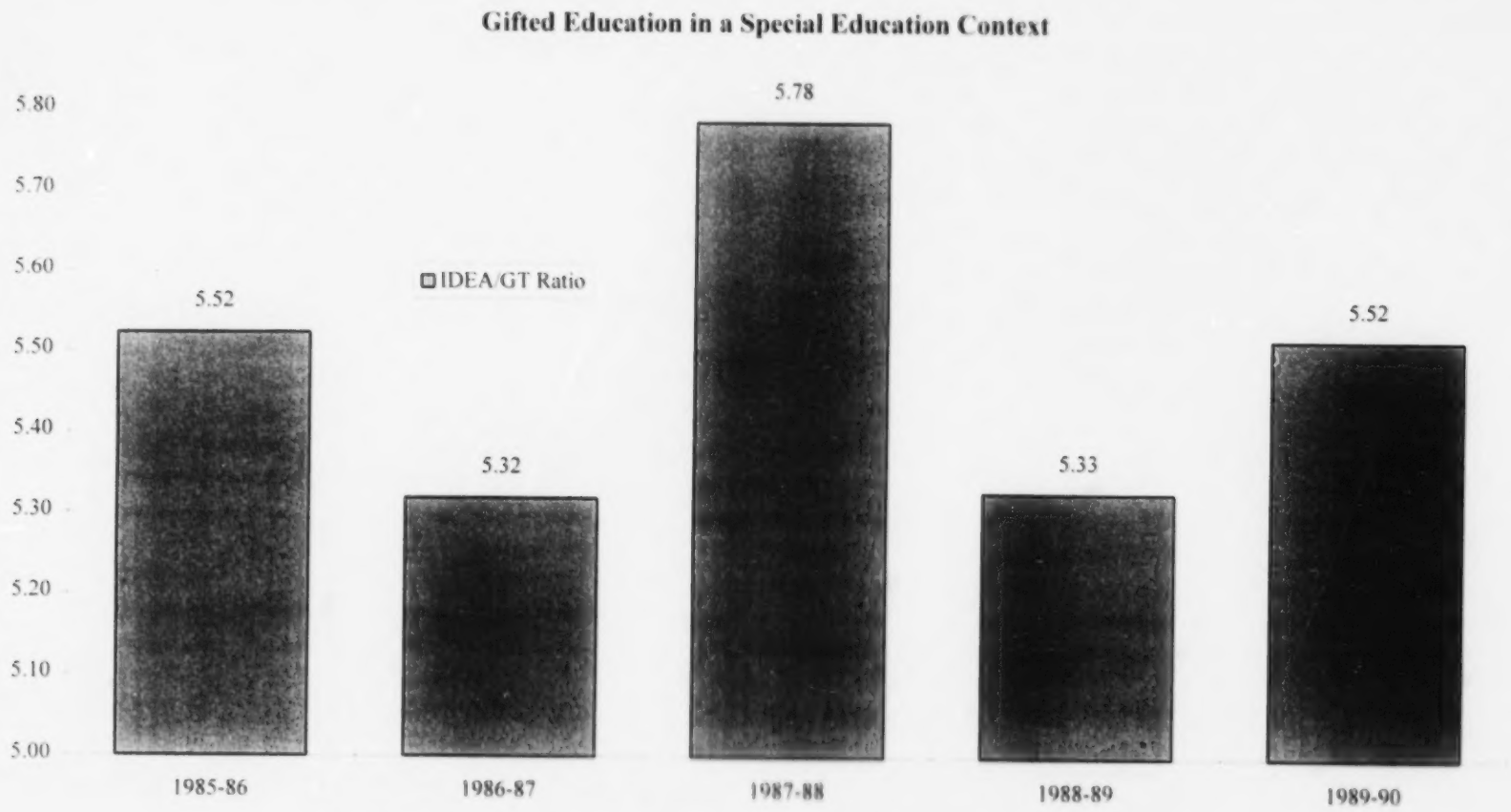
Source: Dr. Alan White, state director for gifted education, CT State Department of Education

Chart 5. Numbers of pupils identified and served in Connecticut gifted and talented programs as a percent of Average Daily Attendance



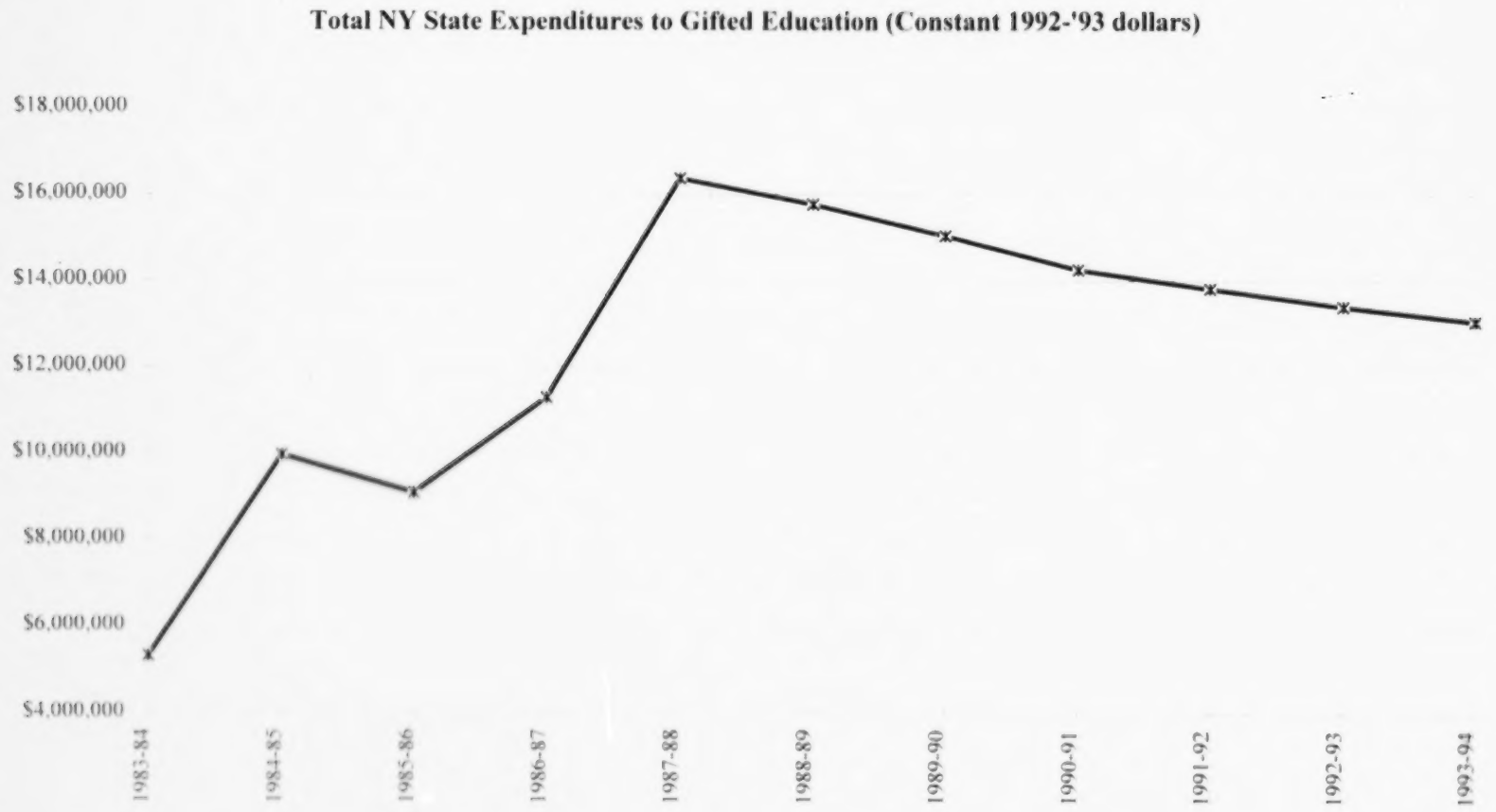
Source: Dr. Alan White, CT State Department of Education

Chart 6: Ratios of total special education (IDEA) and Chapter 1 pupils served to gifted and talented pupils served



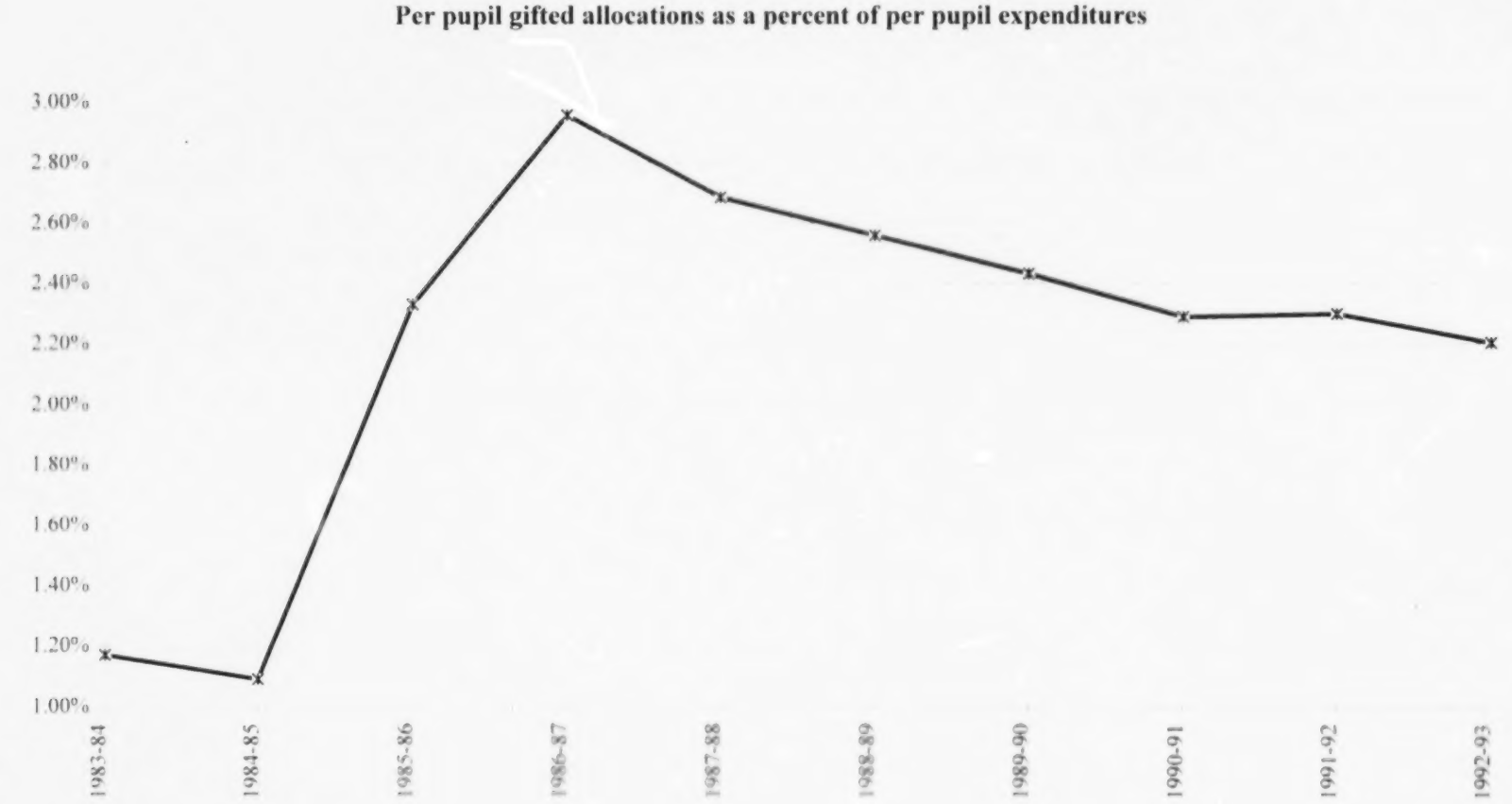
Sources: Dr. Alan White, CT State Department of Education The Center for Special Education Finance

Chart 7. Total state level gifted education spending in NY state



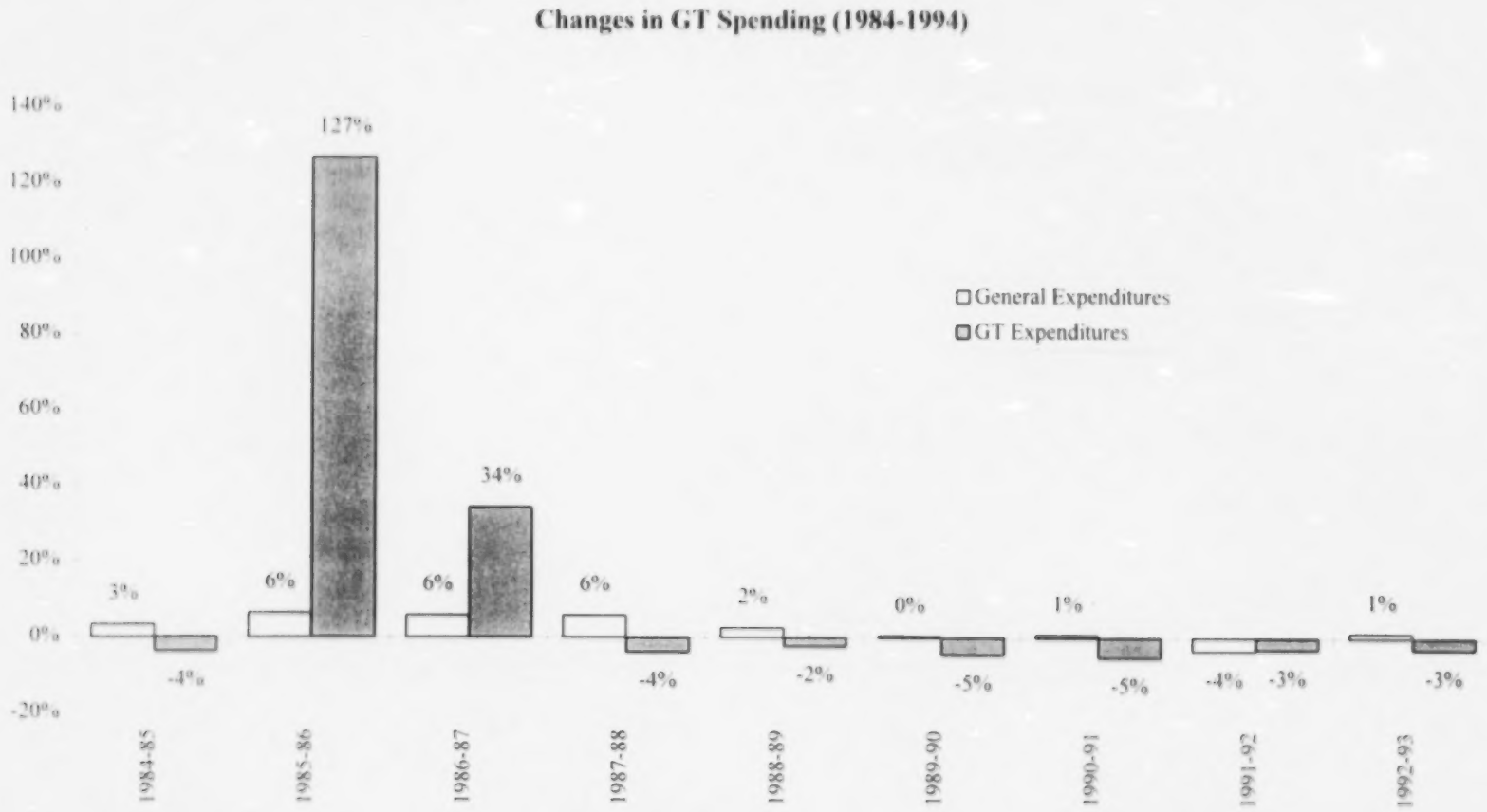
Data for school years 1983-1987 do not include allocations to the state's largest five districts, creating an artifical rapid ascent from 1987 to 1988. Sources: NYSDE State of the States Report

Chart 8: State allocations per pupil as a percent of total per pupil expenditures in NY (Constant 1992-'93 dollars)



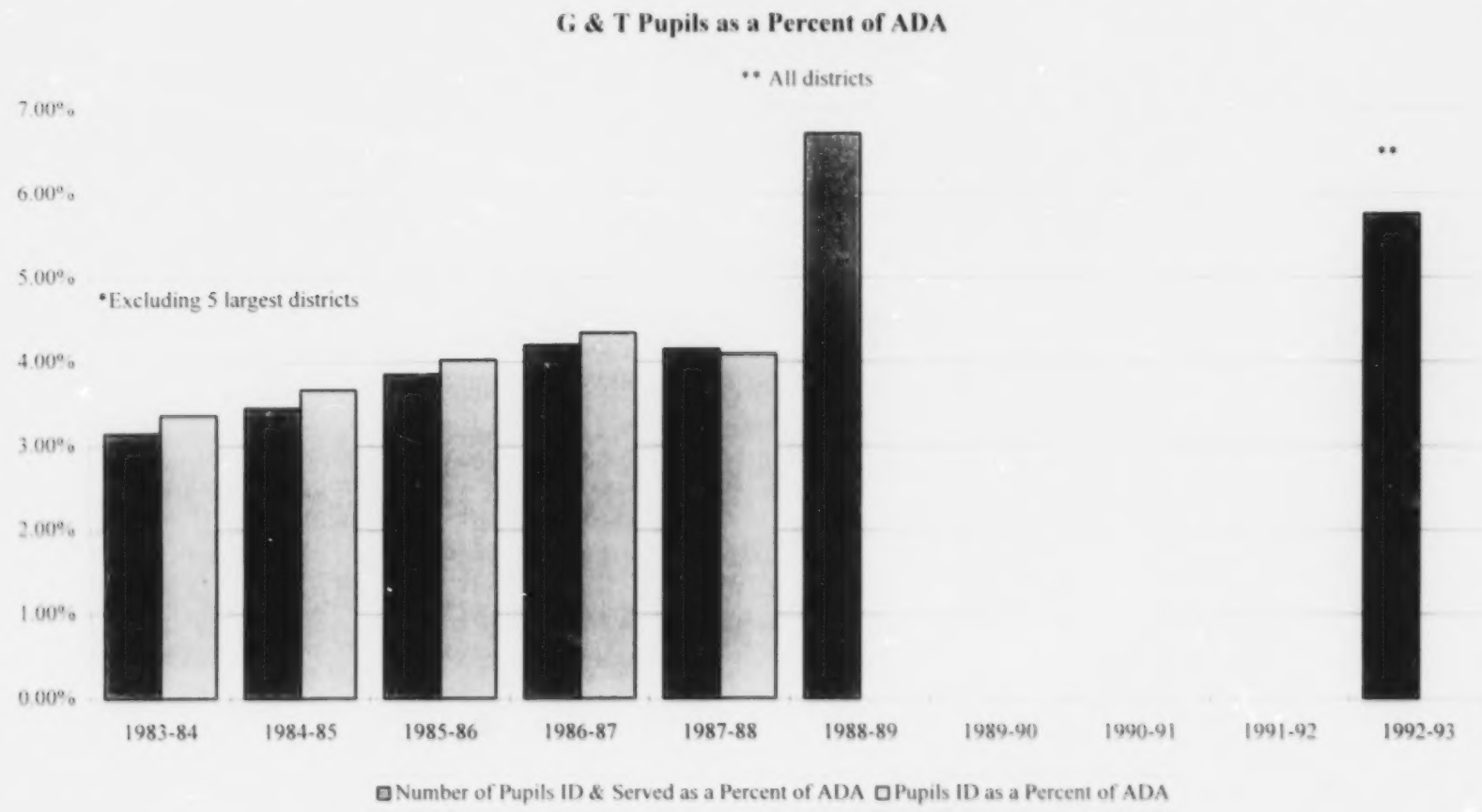
Source: John Curley, New York State Department of Education

Chart 9: Percent change in state level gifted education spending compared with percent change in total spending per pupil (Constant 1992-'93 dollars)



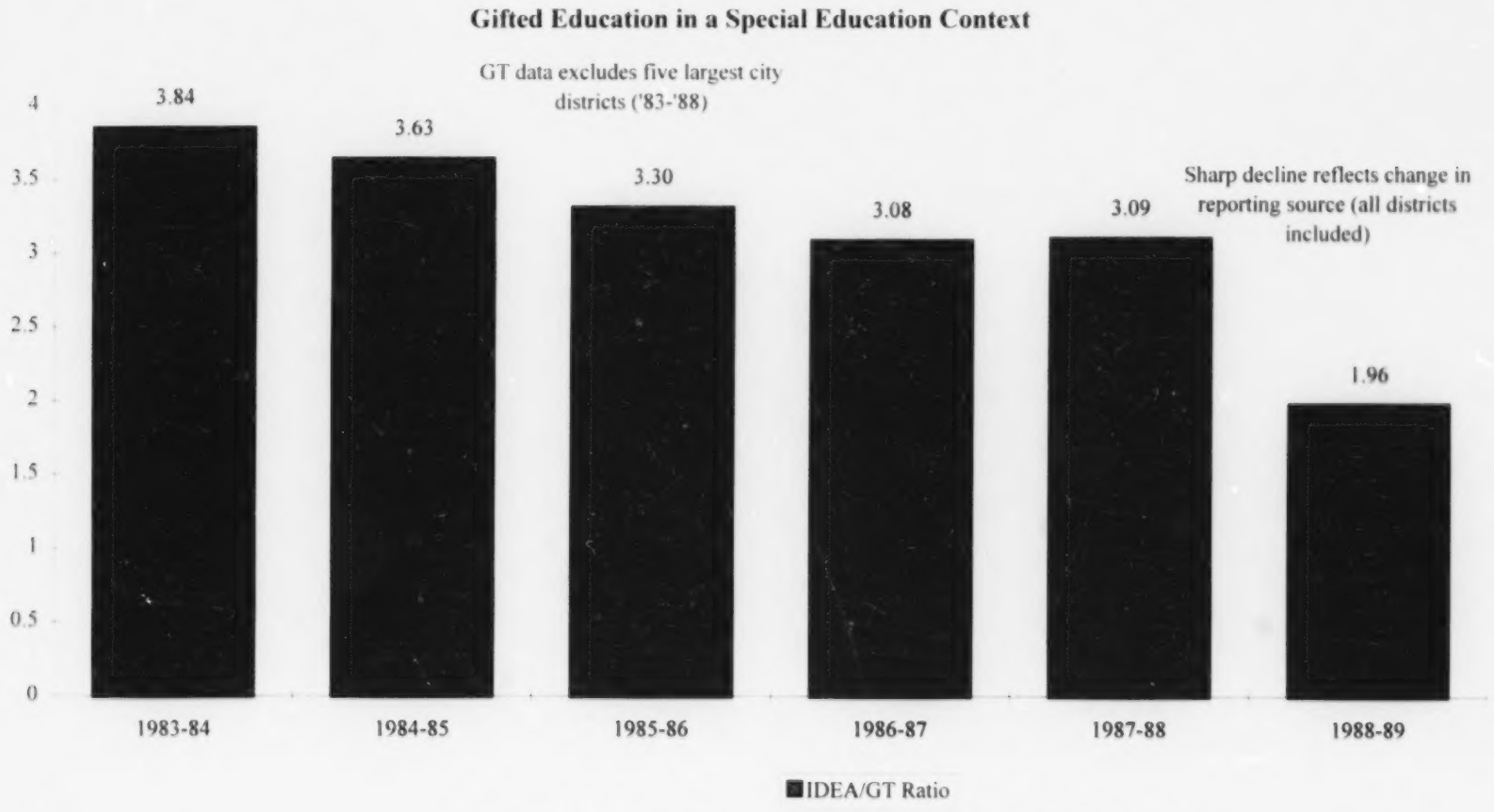
Sources: NY State Department of Education National Center for Education Statistics

Chart 10: Gifted and talented pupils served in New York state as a percent of average daily attendance



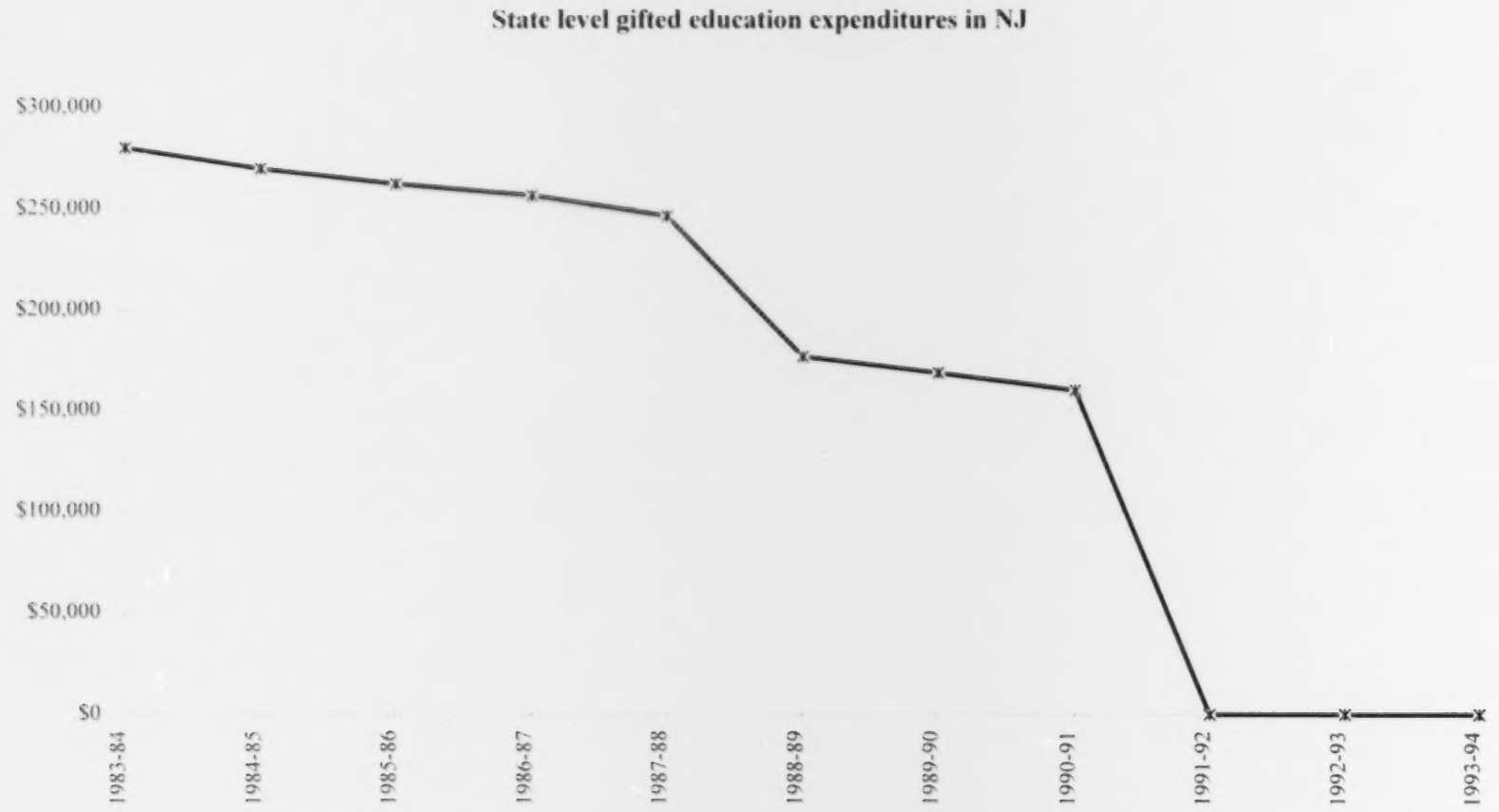
Sources: * John Curley, NYSDE ** State of the States Reports, ADA acquired from NCES

Chart 11. Ratios of total special education (IDEA) and Chapter 1 pupils served to gifted and talented pupils served



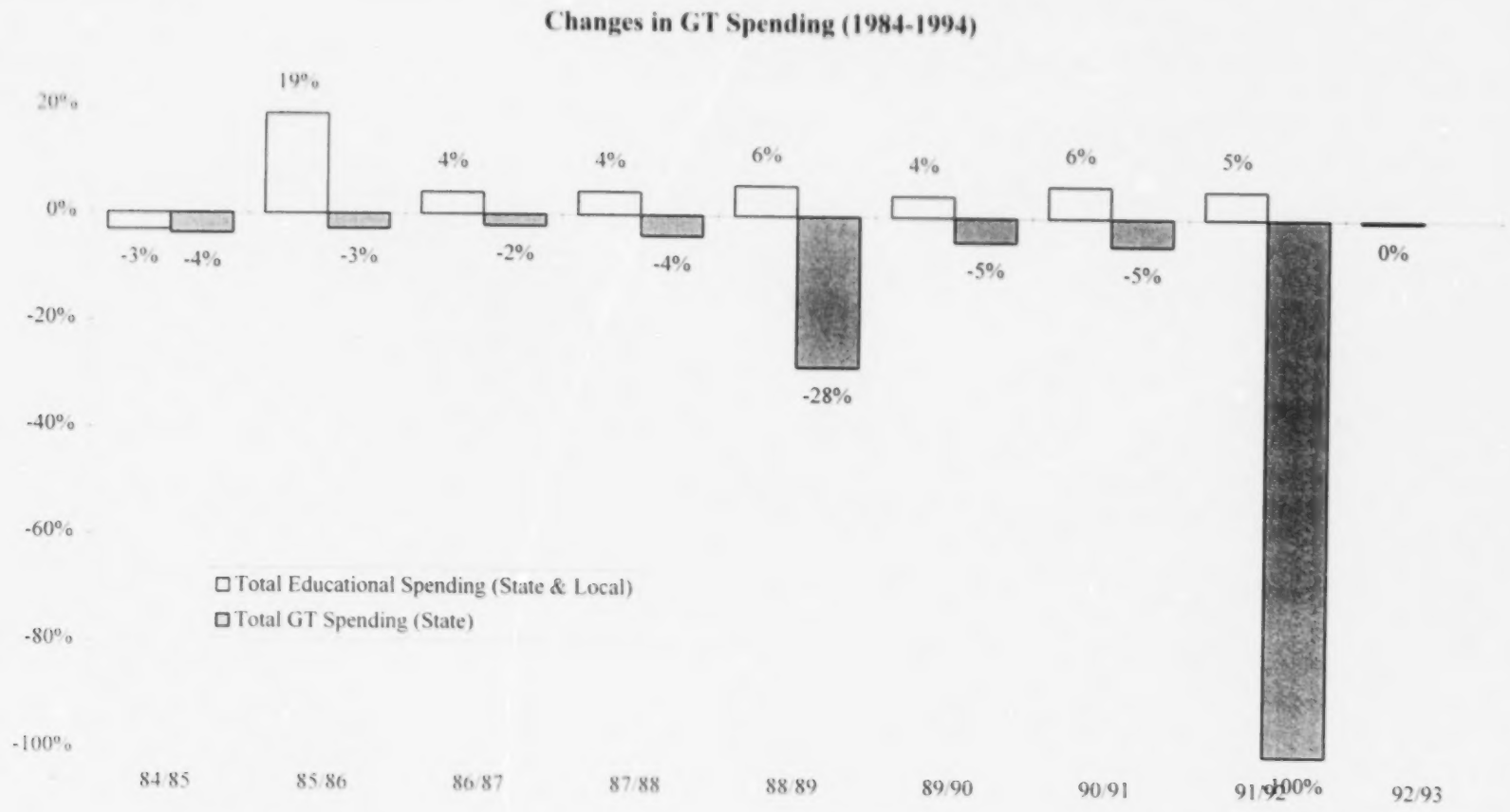
Sources: John Curley (1991), State of the States Report (GT Pupils), National Center for Education Statistics (IDEA?Chapter 1 pupils)

Chart 12: State level expenditures to gifted education in New Jersey (Constant 1992-'93 dollars)



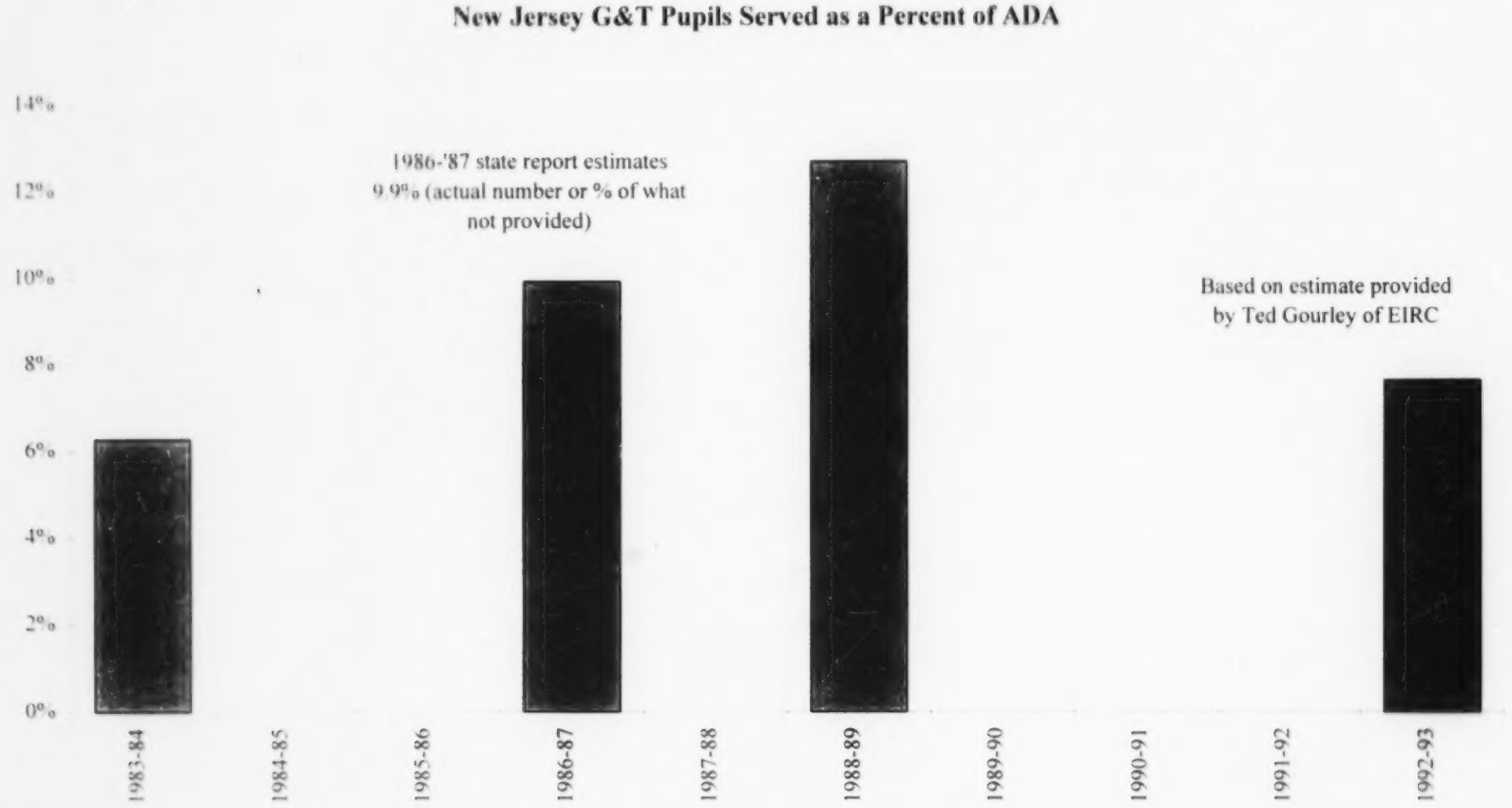
Source: NJ State Department of Education

Chart 13: Percent change in state level gifted education spending compared with percent change in total spending per pupil (Constant 1992-1993 dollars)



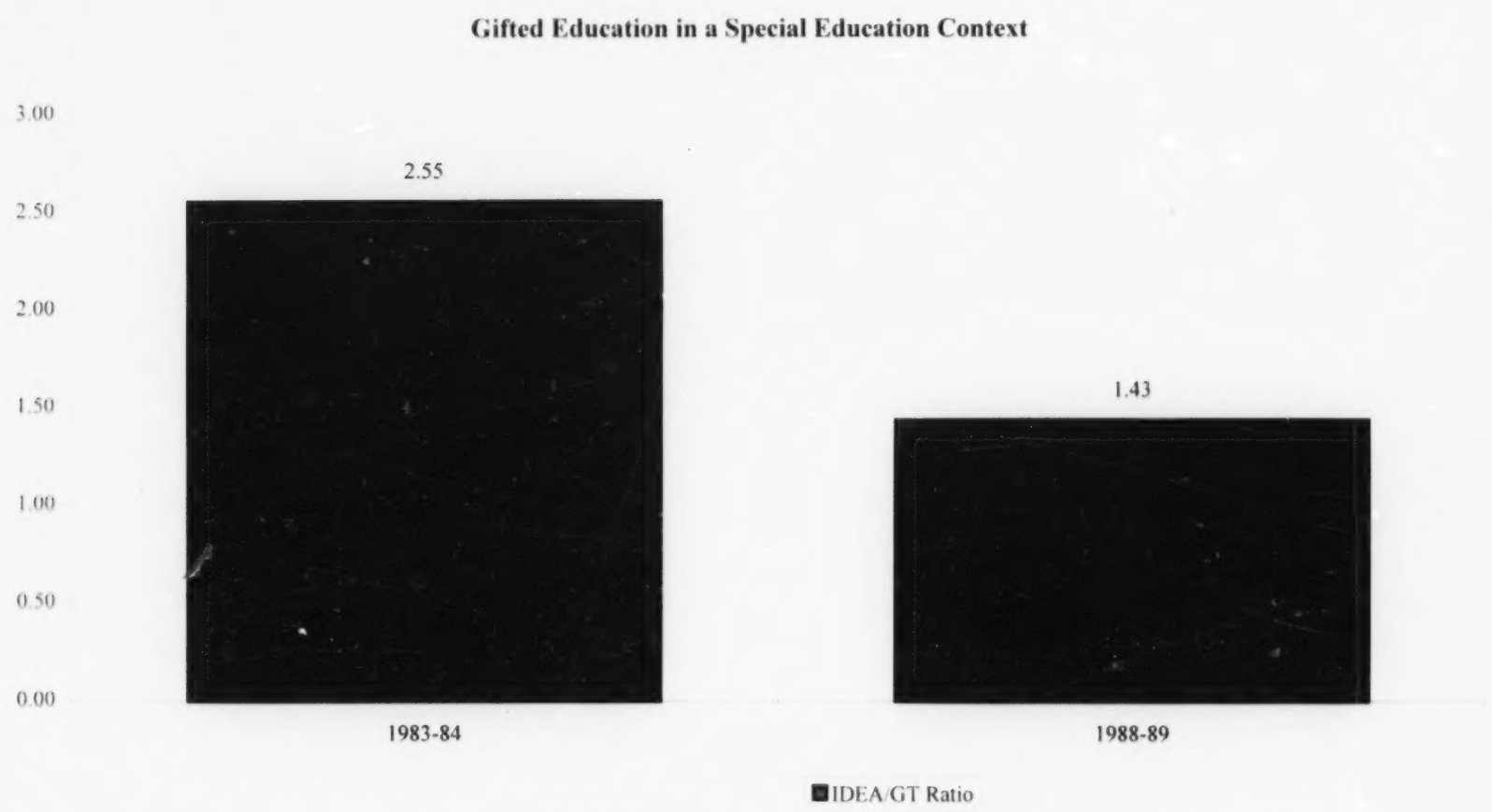
Sources: NJ State Department of Education (G7 40 AM), National Center for Education Statistics (Total PPE)

Chart 14 Numbers of Gifted and Talented pupils served as a percent of average daily attendance in New Jersey



Sources: Education Information Resource Center (Ted Gourley), ADA acquired from National Center for Education Statistics

Chart 15: Ratio of special education (IDEA) and Chapter 1 pupils to gifted pupils served in New Jersey



Sources: State of the States Report (G7.40 AM pupils), National Center for Education Statistics (IDEA/Chapter 1 pupils)

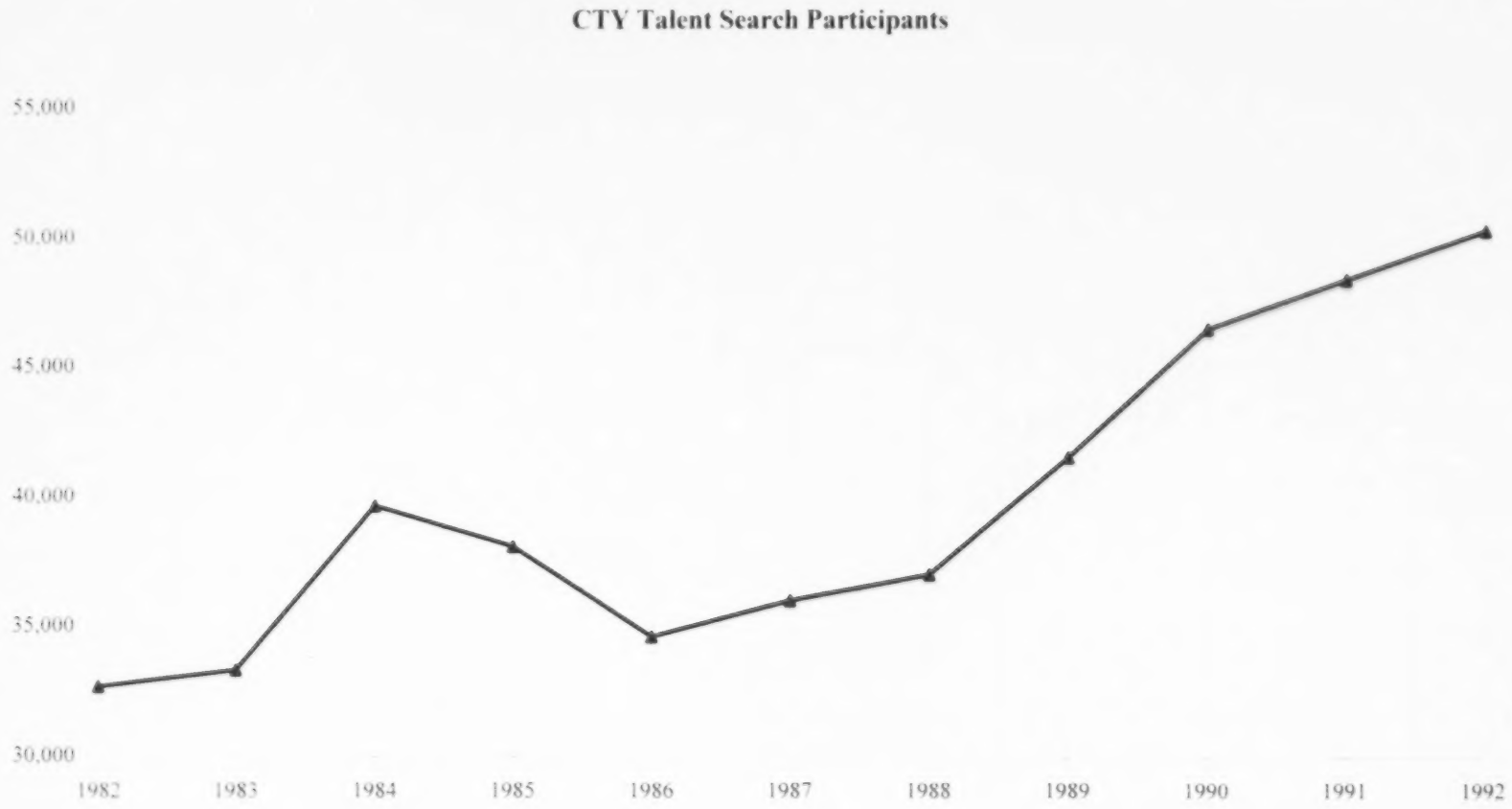
Chart 16: Tuition and student participation levels in College Gifted Program's Summer Institute for the Gifted (NJ, NY, PA)

Source: Dr. Phil Zipse, Director of College Gifted Programs

Chart 17. Tuition and student particupation in Johns Hopkins University's Center for Talented Youth Summer Residential Programs (grade 7 and up)

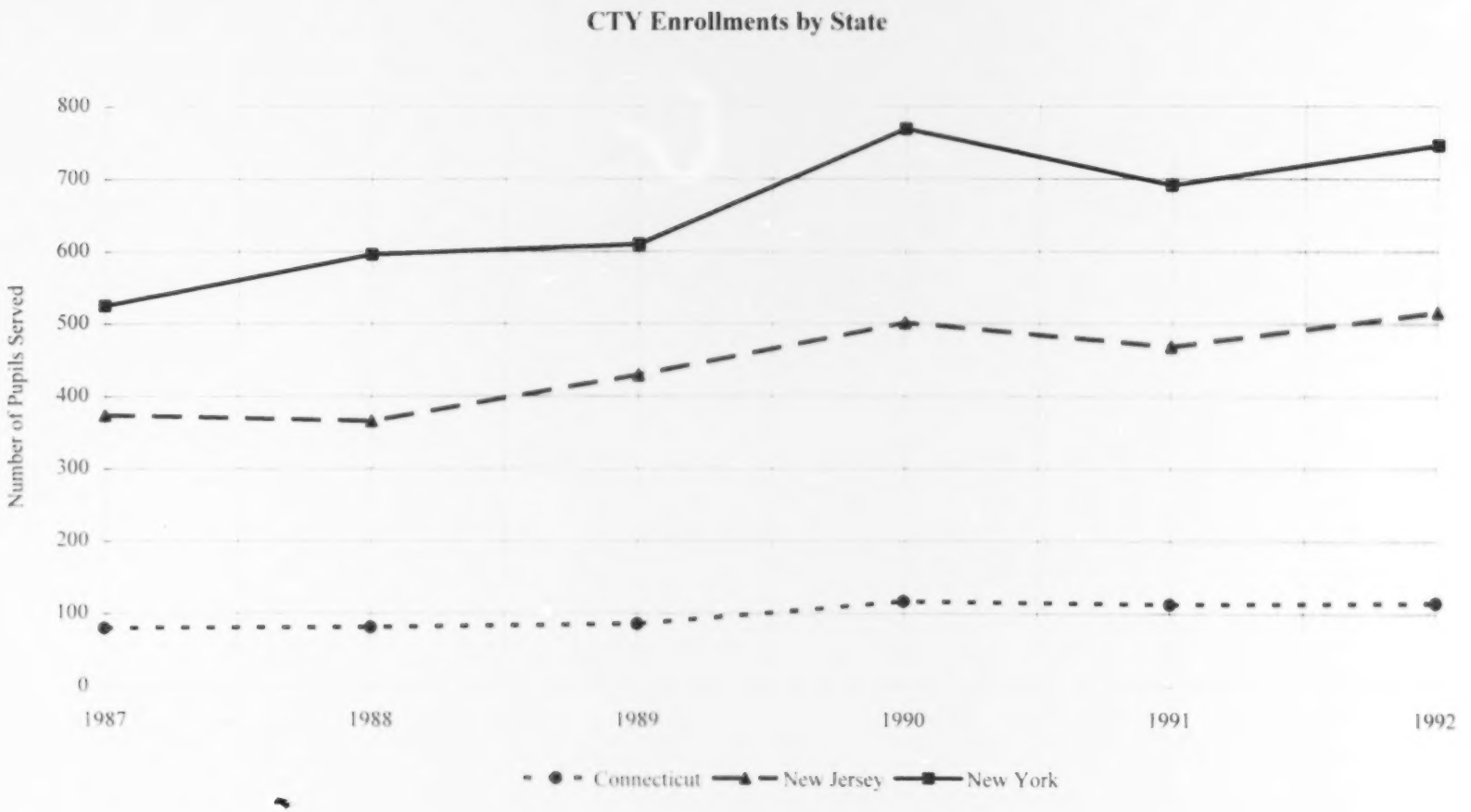
Source: L. Corazza, 1992 Academic Programs Report. A Brief History of CTY's Academic Programs. p. 2

Chart 18 Numbers of students participating in CTY's national talent search



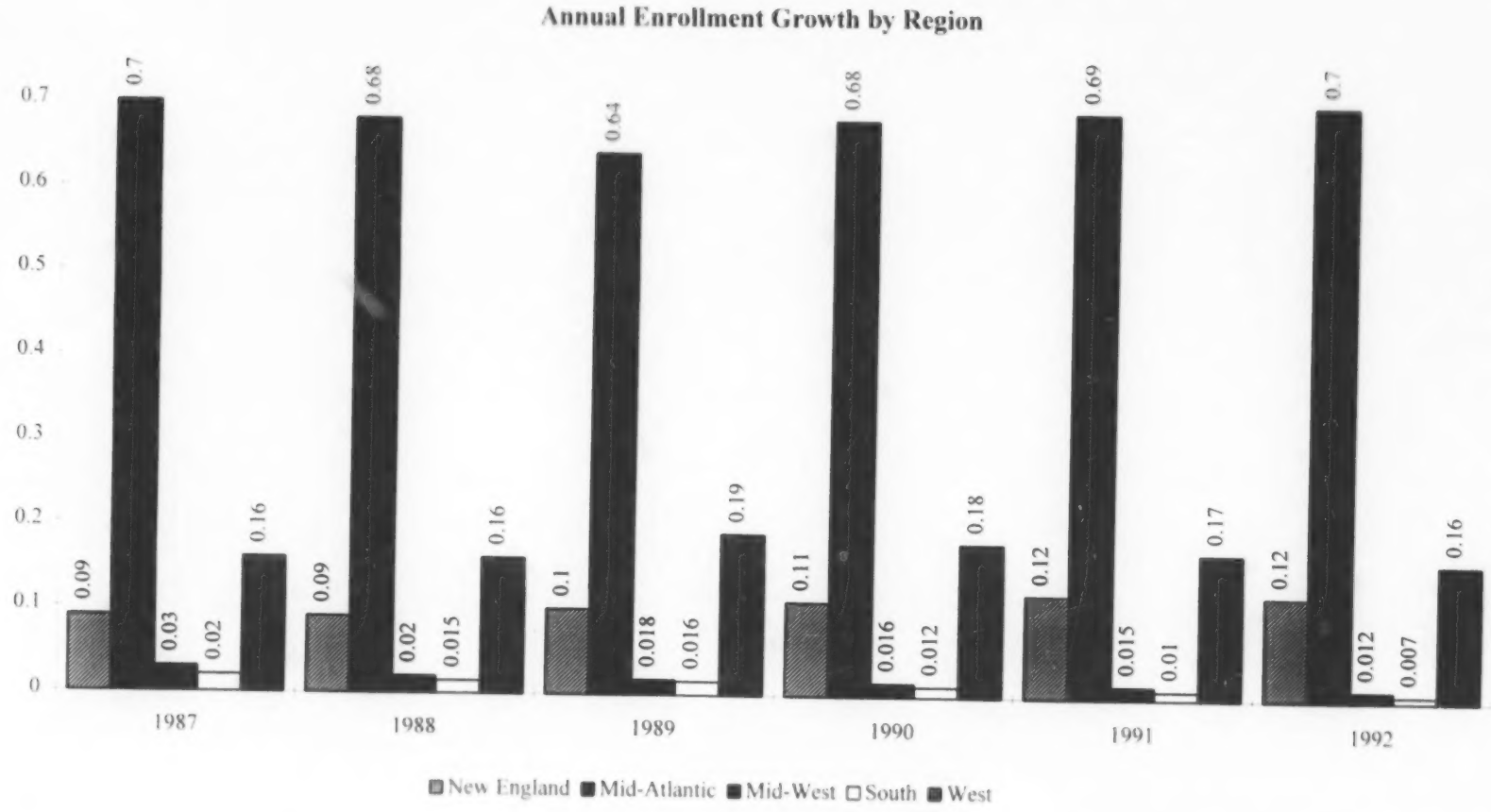
Source Corazza (1992)

Chart 19. CTY Summer program enrollment by state



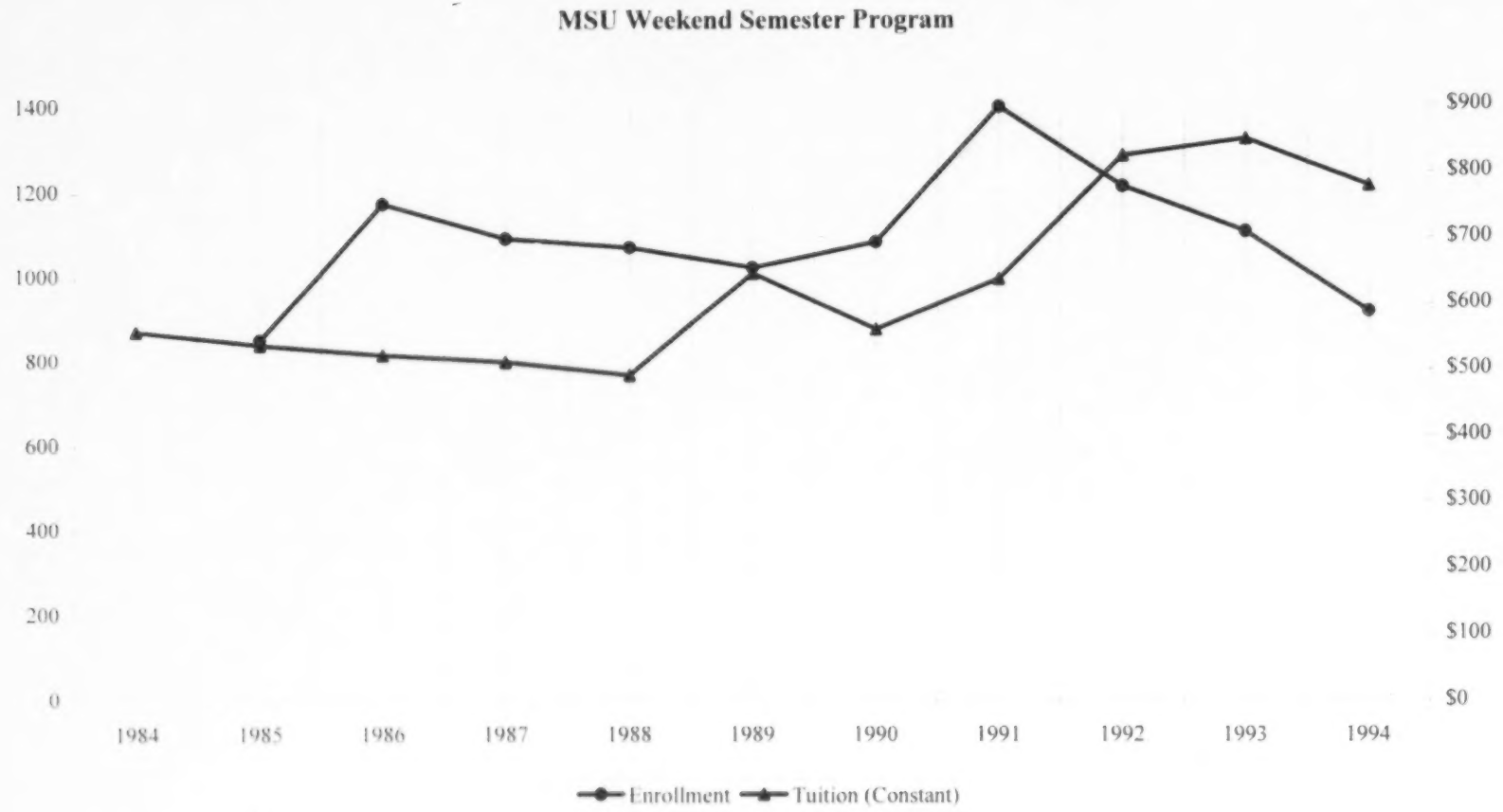
Source: L. Corazza (1992)

Chart 20: Growth in CTY enrollments by region



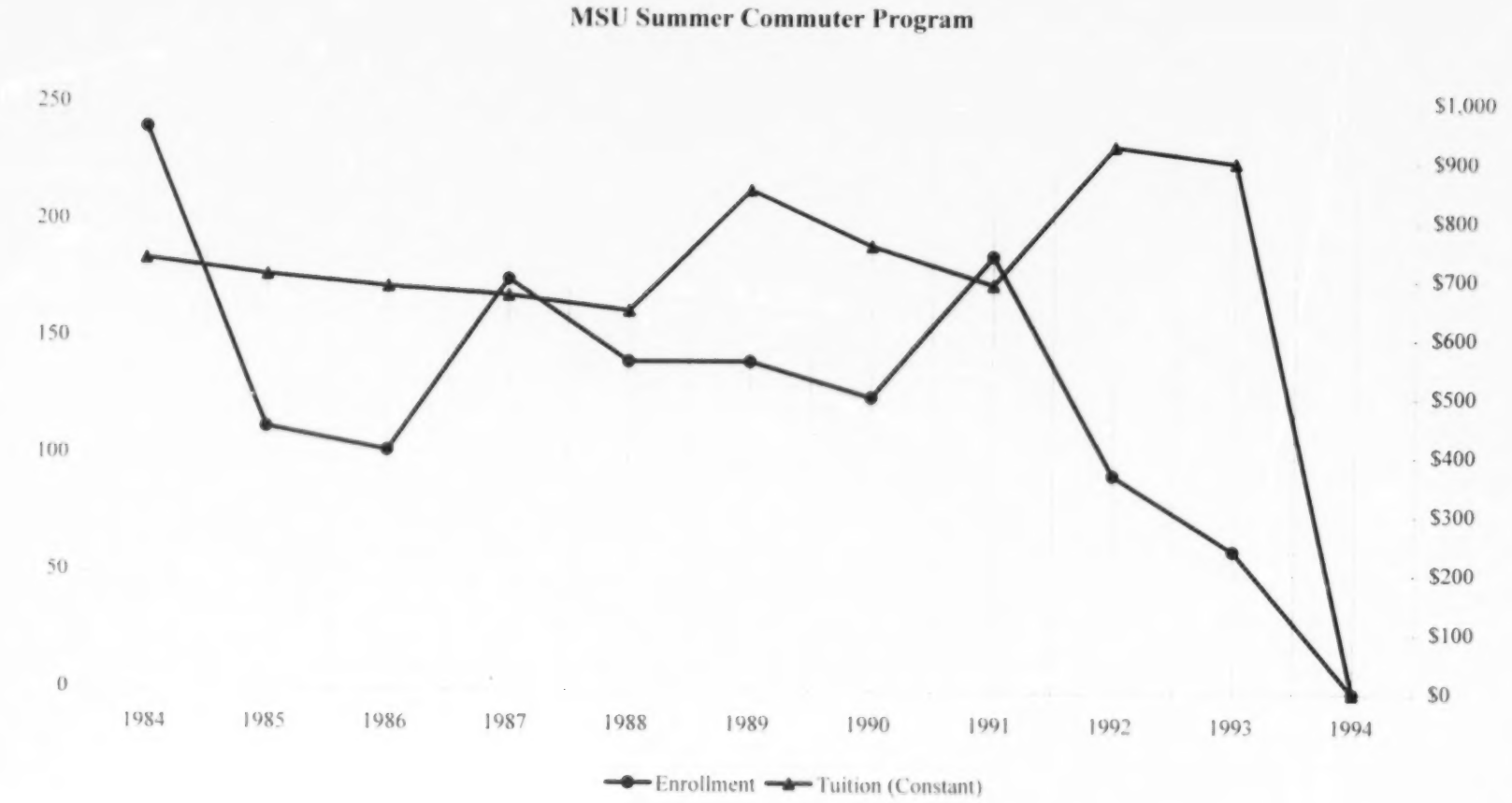
Source: L. Corazza (1992)

Chart 21: Enrollment and tuition levels for Montclair State University's Weekend Semester program



Source: Dr. Richard Taubald, Continuing Education, Montclair State University

Chart 22: Enrollment and tuition levels at Montclair State University's Summer Commuter program



Source: Dr. Richard Taubald